



Chameleon Information Management Services Limited

INFOFLEX v5

DATA ENTRY

USER GUIDE

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1 GETTING STARTED

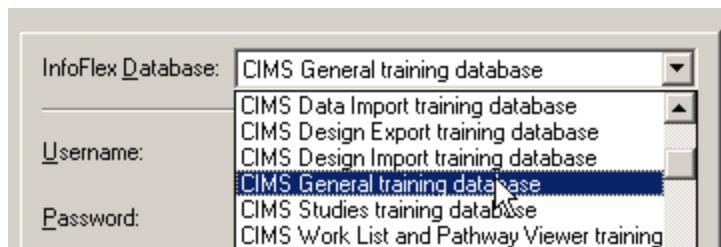
1.1 Starting InfoFlex 5

Start InfoFlex 5 by double-clicking the icon on the desktop.



1.2 Selecting a Database

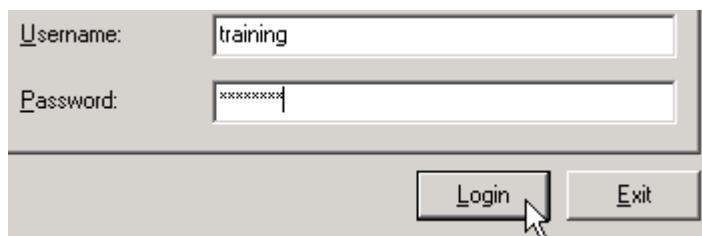
Select the **CIMS General training database** from the dropdown list.



1.3 Logging in

Type **training** in the **Username** box, then press the **tab** key, or use the mouse to move to the **Password** box.

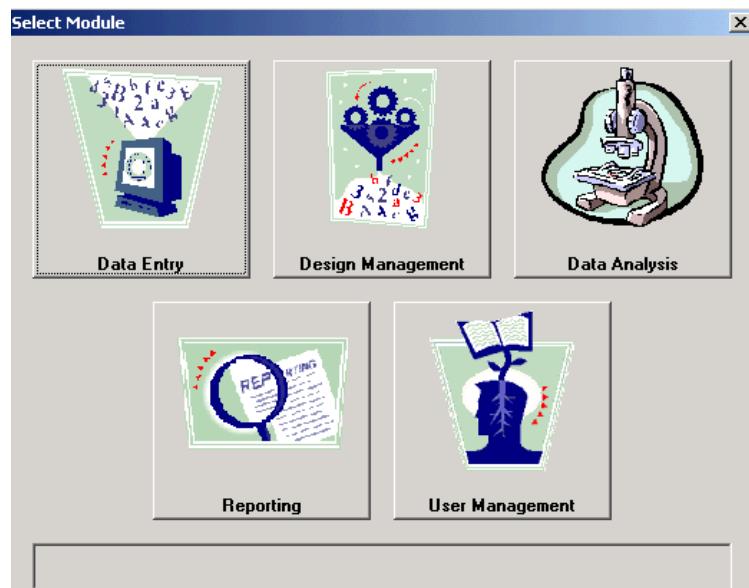
Type **training** in the **Password** box, then press return or click the **Login** button.



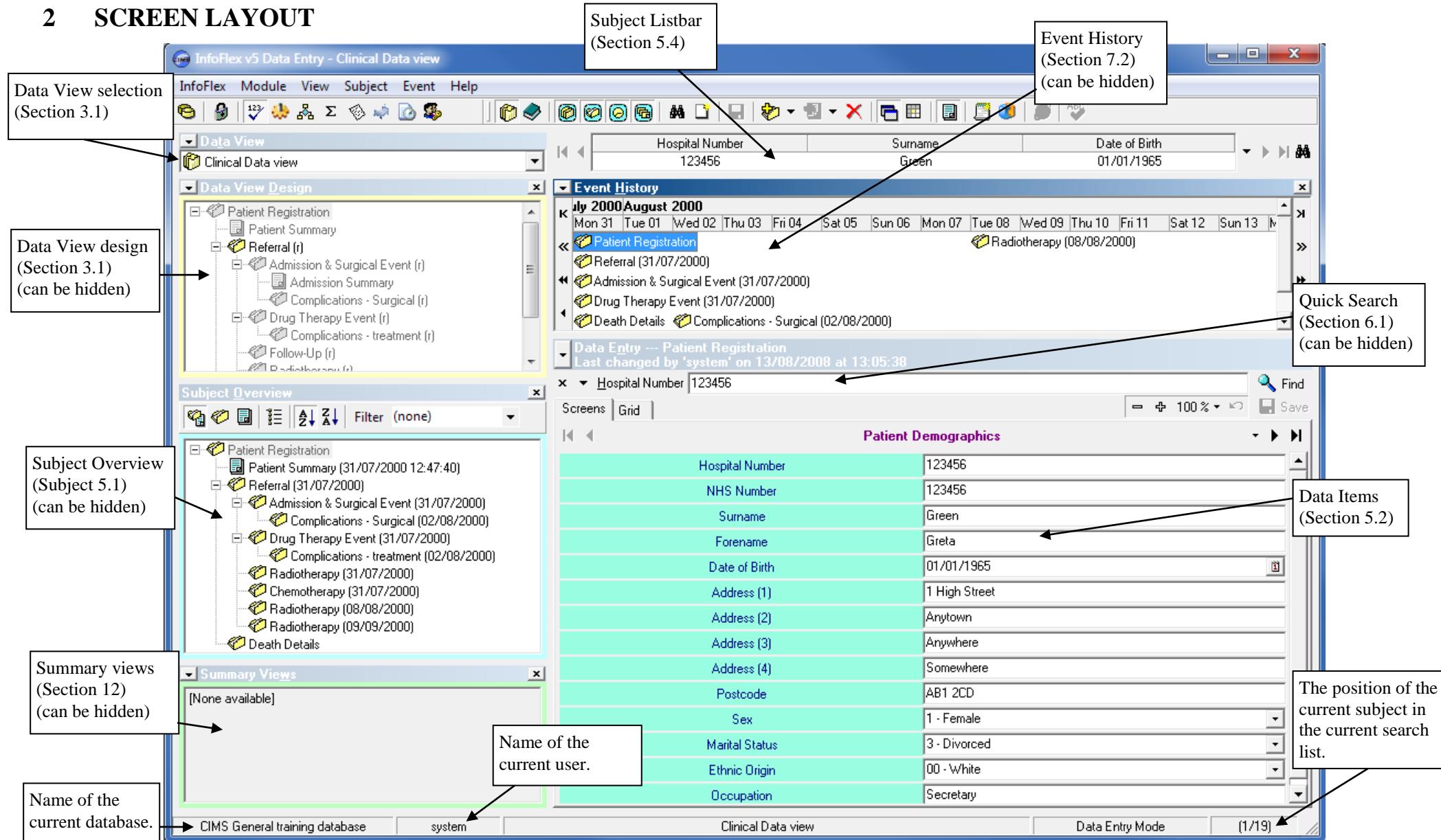
1.4 Selecting the Data Entry module

Click the **Data Entry** picture to open the Data Entry module.

If Data Entry is the only module you have access to, the Data Entry module will open automatically.



2 SCREEN LAYOUT

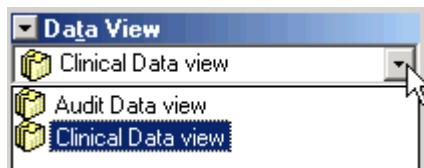


3 DESIGN SELECTION

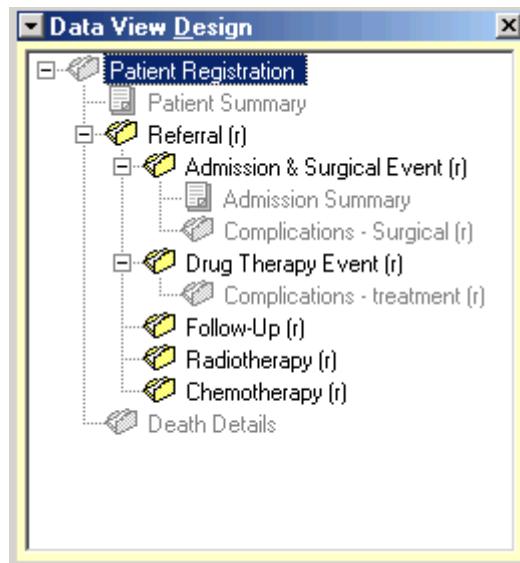
3.1 Selecting a Data view

The Data View selection box displays those data views that are unarchived, and that have been made available in User Management to the current user.

Select **Clinical Data view** from the dropdown list of data views.



When you select a data view, the data view design of your selected data view is then displayed in the **Data View Design** box. The data view design shows the structure of events that can occur for a patient in this data view.

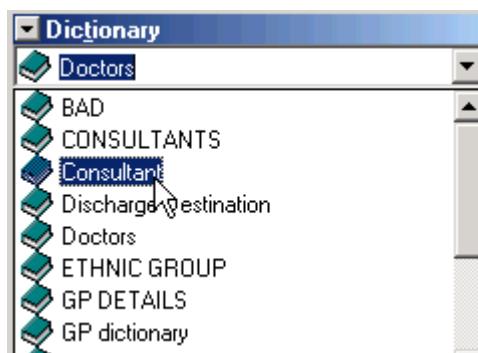


3.2 Selecting Dictionary Data views

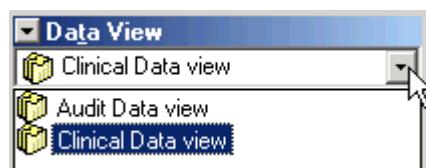
Use the dropdown toggle to switch to dictionary selection.



Open the dropdown list of dictionaries to review the dictionaries that exist in this database.



Switch back to Data view selection and select the **Clinical Data view**.

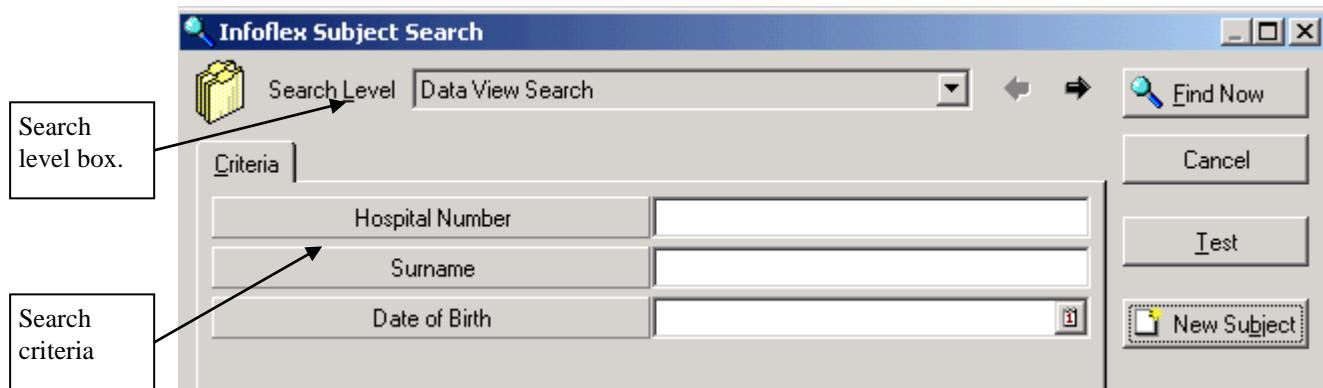


4 SEARCHING

4.1 Search for all subjects

Press **F6** or click the **Find** button on the toolbar. 

The **InfoFlex Subject Search** window is displayed.



The search criteria available on the **Criteria** tab are the items that have been set as the primary and secondary identifiers in the domain.

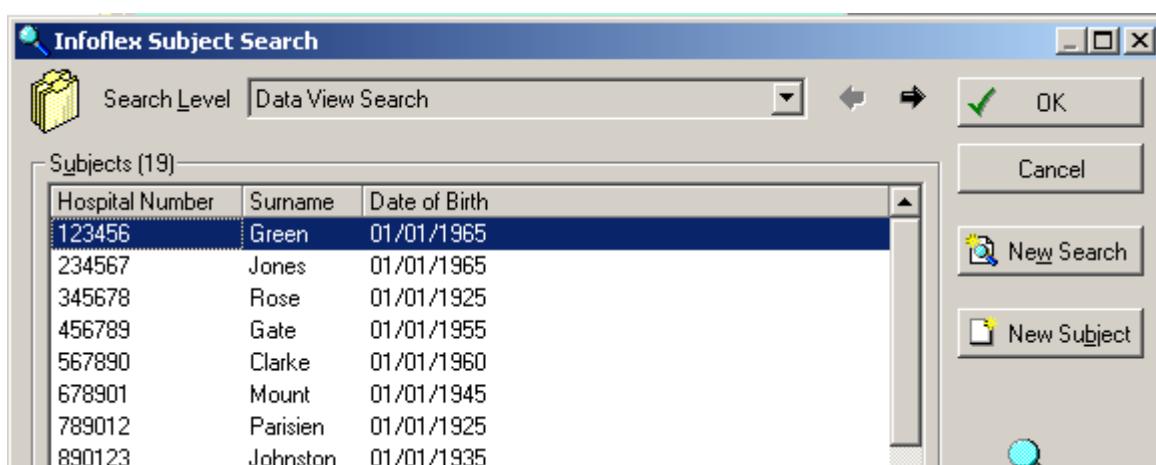
Note that the **Search Level** box indicates that the data view is being searched. This indicates that the search is looking only for patients registered in studies that are represented in the data view. Data View search is the default search level. (See Appendix F for more details about search levels).

Leave the search criteria empty and press the  **Find Now** button. Leaving the search criteria blank will carry out a search for all subjects in the data view.

Click **OK** to the message. **This will return all subjects in Data View.**

Click **OK** on the message **19 subject(s) matching search criteria found in Data View.**

The 19 subjects found are displayed in the **Subjects** box.



Hospital Number	Surname	Date of Birth
123456	Green	01/01/1965
234567	Jones	01/01/1965
345678	Rose	01/01/1925
456789	Gate	01/01/1955
567890	Clarke	01/01/1960
678901	Mount	01/01/1945
789012	Parisien	01/01/1925
890123	Johnston	01/01/1935

4.2 Search results

Ordering the search grid

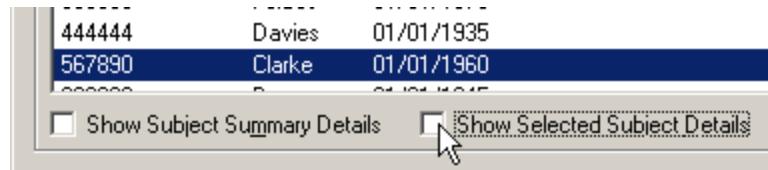
On the **InfoFlex subject search** window, click the **Surname** column heading to order the grid by that column. Click the column heading again to reverse the order of the sort.

A small arrow will appear next to the heading. An up arrow indicates ascending order and a down arrow indicates descending order.

Subjects (19)		
Hospital Number	▲ Surname	Date of Birth
555555	Forbes	01/01/1975
456789	Gate	01/01/1955
123456	Green	01/01/1965
777777	Griffiths	01/01/1920
888888	Hughes	01/01/1990

Show selected subject details

Single click the patient **Clarke** and tick the **Show Selected Subject Details** box.



All of the patient demographic items for the selected patient are displayed in the lower section of the window.

Subjects (19)		
Hospital Number	▼ Surname	Date of Birth
456789	Gate	01/01/1955
555555	Forbes	01/01/1975
444444	Davies	01/01/1935
567890	Clarke	01/01/1960
222222	Brown	01/01/1945

Hospital Number	567890
NHS Number	567890
Surname	Clarke
Forename	Chris
Date of Birth	01/01/1960

Show Subject Summary Details Show Selected Subject Details

Remove the tick from the **Show Selected Subject Details** box.

Show subject summary details

Tick the **Show Subject Summary Details** box.

Further items from the patient demographics event are displayed for all the patients in the Subjects list.

Subjects (19)						
Hospital Number	NHS Number	Surname	Forename	Date of Birth	Address (1)	
111111	111111	Smith	Susie	01/01/1950	1 The Way	
123456	123456	Green	Greta	01/01/1965	1 High Street	
222222	222222	Brown	Bill	01/01/1945		
234567	234567	Jones	John	01/01/1965	Test	
333333	333333	Joseph	John	01/01/1985		
345678	345678	Rose	Richard	01/01/1925	Test	
444444	444444	Davies	Diane	01/01/1935		
456789	456789	Gate	Gardenia	01/01/1955	Test	
555555	555555	Forbes	Francis	01/01/1975		

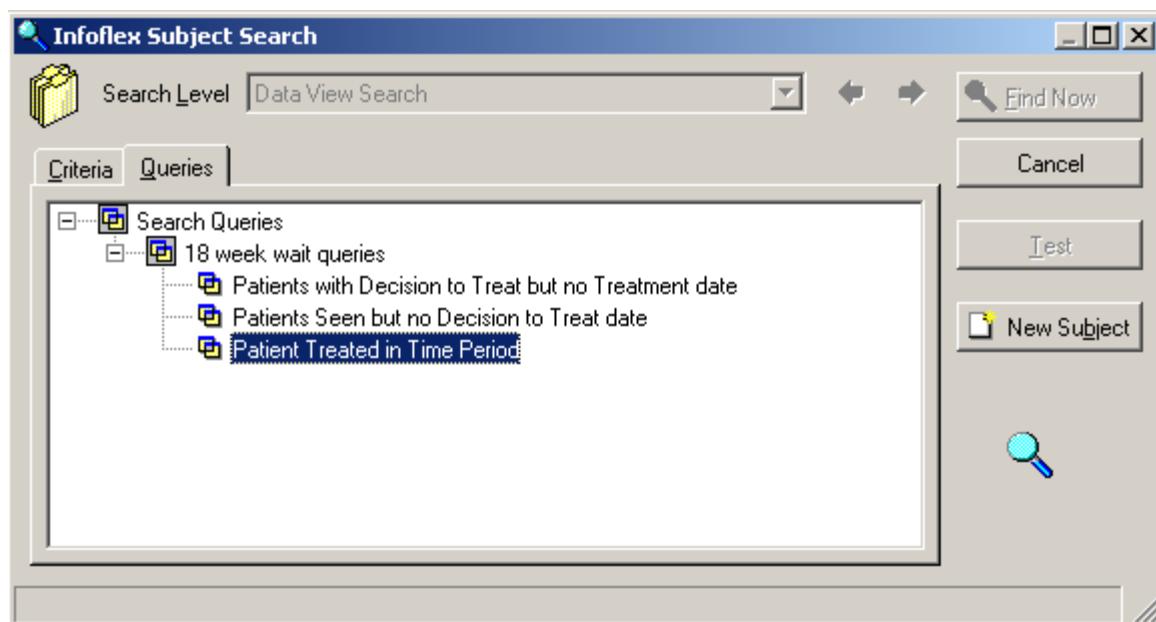
Show Subject Summary Details Show Selected Subject Details

4.3 Searching using queries

Some data views may have subject search queries defined. These allow you to search for subjects using a broader query (eg all the patients for an MDT meeting; all the patients belonging to a particular consultant; the patient list for a clinic; all patients that have no decision to treat date; all females between 18 and 65 who have had a referral in the last year, etc).

If any subject search queries have been defined, they will be available on the **Queries** tab.

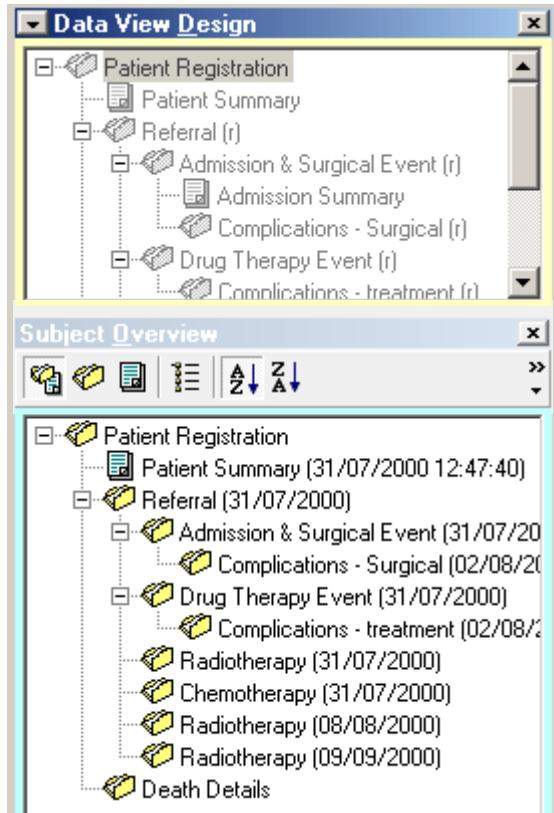
To search for subjects using a query, simply select the query on the Queries tab then press the Find button in the usual way. The subjects found are displayed as normal.



5 VIEWING SUBJECTS

5.1 Displaying a patient

Double click patient **123456 Green** in the subjects list to select the patient and display the patient's subject overview in the **Subject Overview** box.

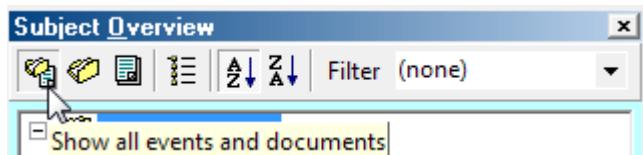


5.2 Displaying events and documents

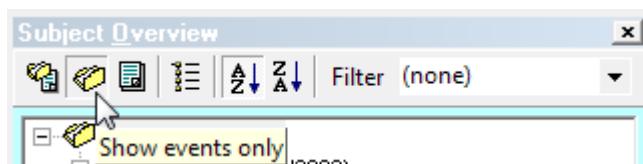
5.2.1 Displaying events and documents

You can choose whether to display both events and documents, events only or document only.

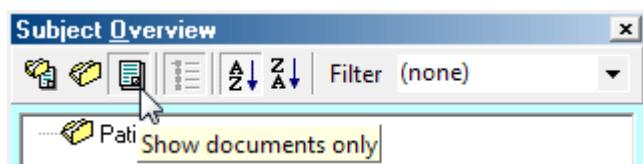
In the Subject Overview, press  to display both events and documents.



Press  to display events but not documents.



Press  to display documents but not events. This option shows all the documents for the patient in date order and in a single 'flattened' list attached to the Patient Demographics event.

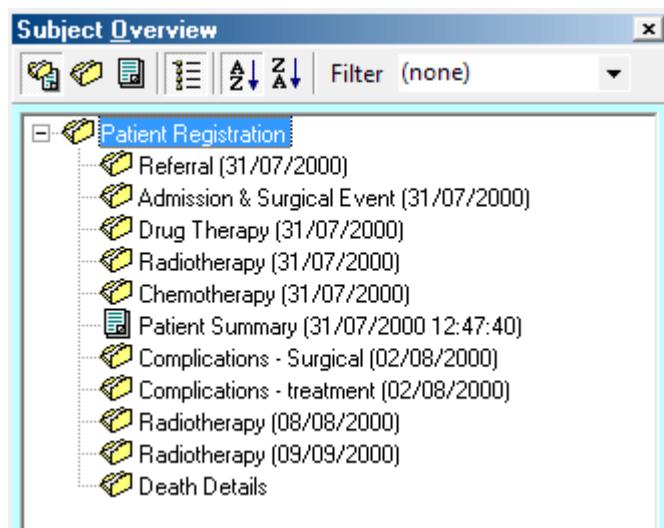


If the **Show Documents** property of the data view definition is set to **true** then both events and documents will be shown by default when a data view is first selected, otherwise just events will be shown.

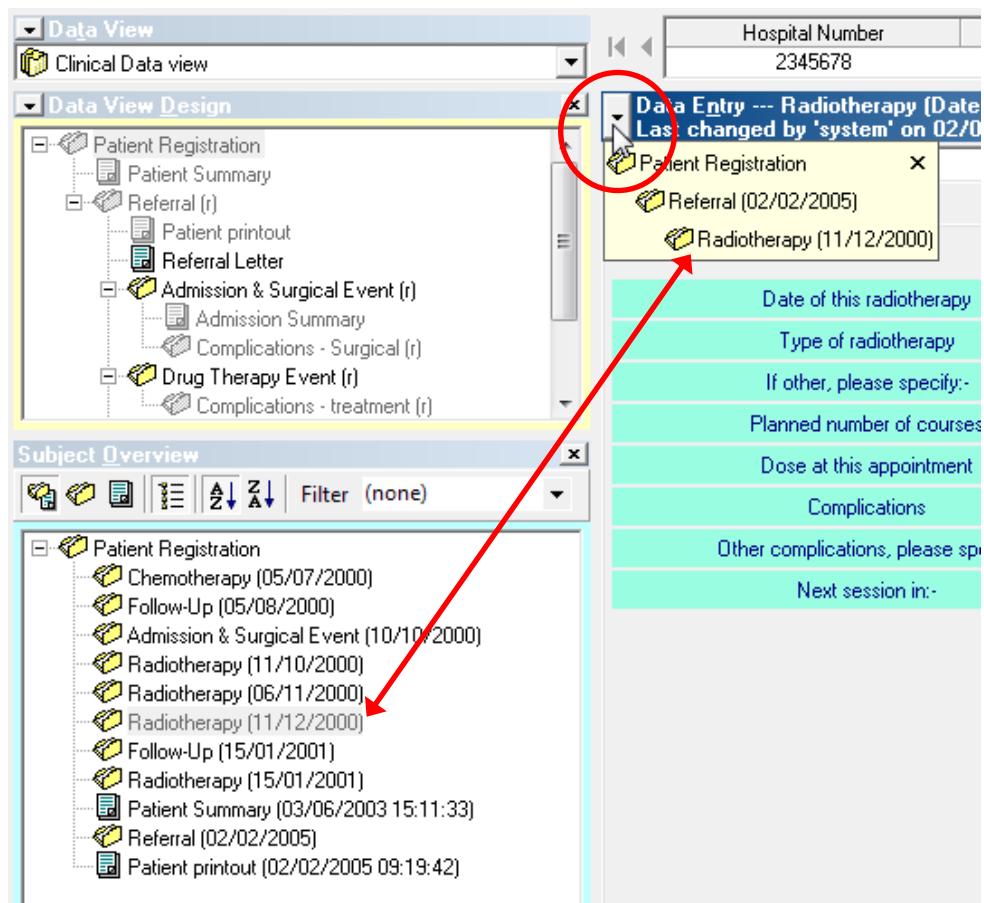
The **Show Documents** button on the InfoFlex toolbar also affects the **Show All** and **Show Events Only** buttons. If the **Show Documents** button on the InfoFlex toolbar is switched off, the Subject Overview toolbar gets set to **Show Events Only**. If the **Show Documents** button on the InfoFlex toolbar is switched on, the Subject Overview toolbar gets set to **Show All**.

5.2.2 Displaying a flattened tree

Press  to display events and/or documents 'flattened' beneath the root event. Events and documents are shown in date order.



If you want to see the hierarchy of a particular event, you can press the dropdown arrow next to the Data Entry Screen caption to view the parents of the currently selected event.



Notes about flattening

Events that have a sort date specified use that sort date rather than the identifier. Events with no identifier or sort date are listed after their parent event.

Documents that are configured to **Show latest as parent** are still displayed in that way when the subject overview flattened.

New events and documents can be if the subject overview is flattened.

If the tree is set to **Show Documents Only**, the **Flatten Events and Documents** button is disabled, since the tree has to be flattened when only documents are shown.

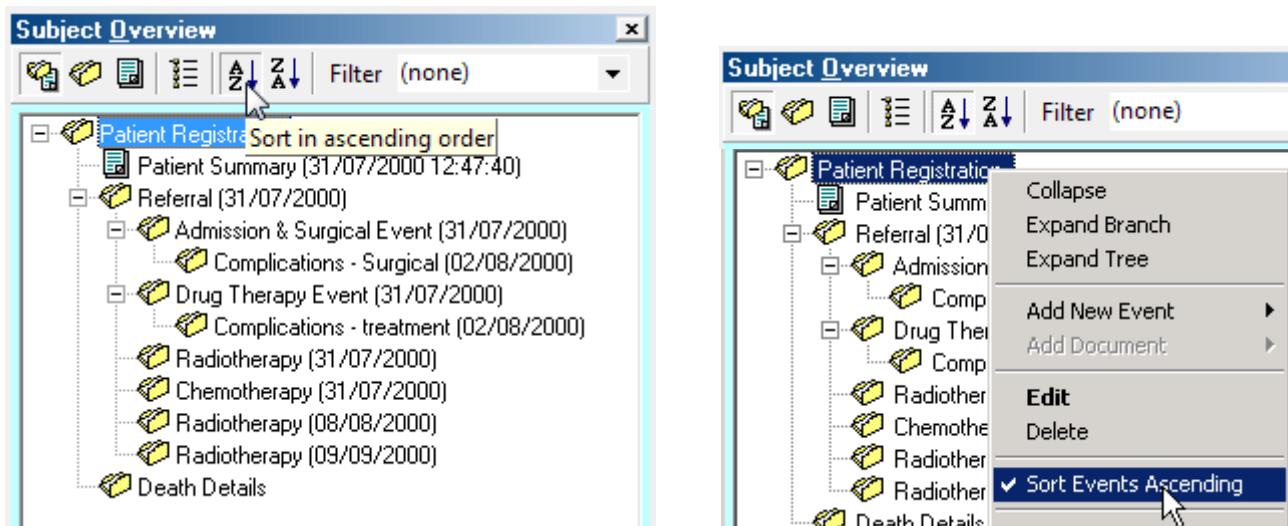
5.2.3 Event ordering

You can choose whether events are displayed in ascending or descending order in the subject overview.

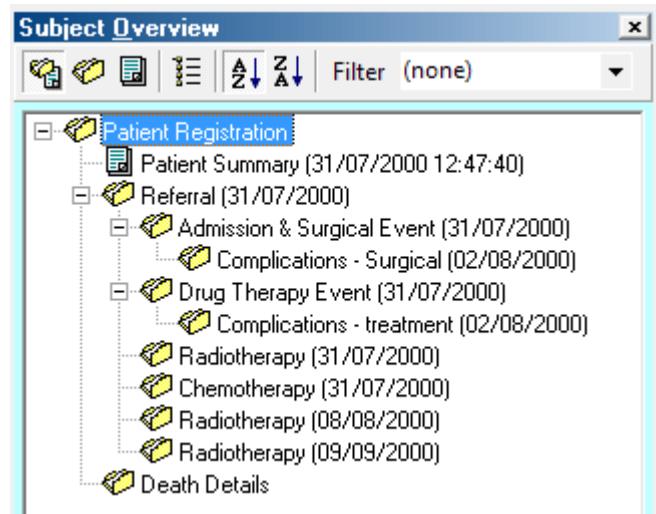
When events are displayed in ascending order, the events in the subject overview are displayed in a combination of design and date order, according to the number repeat and one-off events. Appendix E contains full details of the rules about event ordering.

Select patient **123456 Green**.

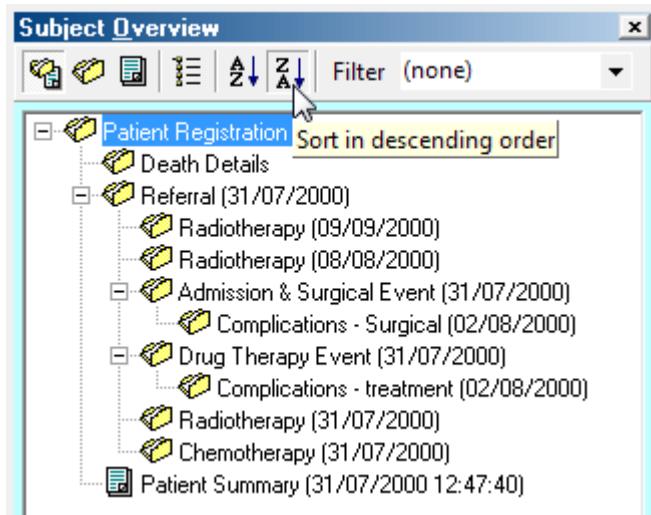
In the subject overview click the **AZ↓** button to sort the events in ascending order. You can also right click and choose **Sort Events Ascending**.



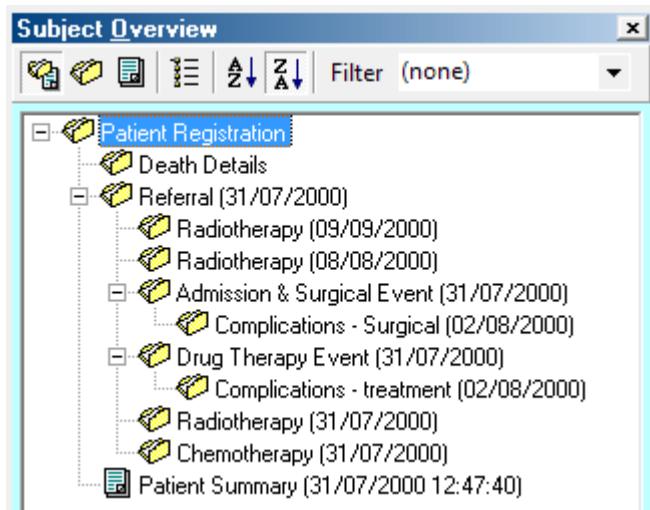
The subject overview looks like this when the events are sorted in **ascending** order:



Press the **Z****A****↓** button to sort the events descending.



The subject overview looks like this when the events are sorted in **descending** order:



5.2.4 Filtering events

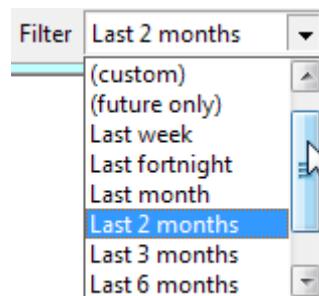
User the **Filter** dropdown to filter the events by date.

The filter can be used in conjunction with the flattening button. If the tree is **not** flattened, older parent events will still be displayed if their descendants occur within the selected time period.

If an event has a specified sort date that is different from the event identifier, the event is filtered by that specified sort date.

Whenever a data view is selected, the Filter dropdown is automatically set to the default value specified in Design Management.

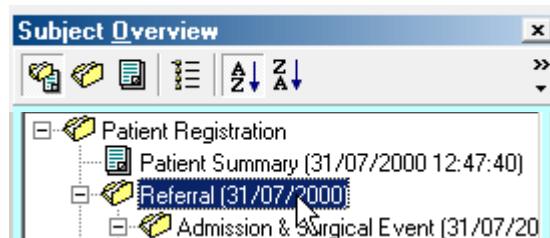
New events and documents can be added when filtering is applied. If a new event is added that is outside of the current filter setting, the event continues to allow editing even though after saving it is not visible in the subject overview.



5.3 Displaying data items

To display the data that has been entered in an event, single click that event in the patient's Subject Overview.

Single click the **Referral** event in the subject overview to display the data items in the Referral event.



The data items on the first screen of the Referral event are displayed on the **Screens** tab.

You can zoom in and out using the zoom controls next to the save button.

5.4 Screen bar

Click the screenbar heading to display a list of screens. Use the screen bar to select the **Assessment details** screen.



Use the arrows to the left and right of the screen bar to scroll between screens.



Use the keyboard shortcuts to move between screens.

Ctrl+Home	Move to first item on first screen
Ctrl+End	Move to last item on last screen
PgUp	Scroll up one page of items
PgDn	Scroll down one page of items
Ctrl+PgUp	Move to first item on previous screen
Ctrl+PgDn	Move to first item on next screen
Shift+PgUp	Move to first item in current screen
Shift+PgDn	Move to last item in current screen
Return	Move to next item or branch item's target
Shift+Return	Move to previous item
Tab	Move to next item (doesn't branch)
Shift+Tab	Move to previous item.

5.5 Subject Listbar

Single click a column heading in the subject listbar to order the subjects by that column.



Hover the mouse over the patient and see where the patient is in the list (eg subject 8 of 19).

Click the drop down arrow on the subject list bar to display the patients.

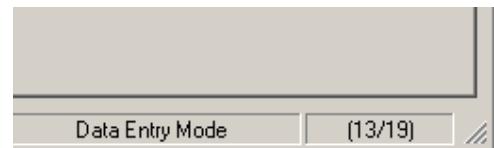
Hospital Number	Surname	Date of Birth
123456	Green	01/01/1965
123456	Green	01/01/1965
777777	Griffiths	01/01/1920
888888	Hughes	01/01/1990
890123	Johnston	01/01/1935
234567	Jones	01/01/1965
333333	Joseph	01/01/1985
901234	Miles	01/01/1980
678901	Mount	01/01/1945
789012	Parisien	01/01/1925
345678	Rose	01/01/1925

Single click patient **678901 Mount** to display that patient.

Use the arrows to the left and right of the subject listbar to scroll through the patients.



Note that the bottom right hand corner of the Data Entry screen shows a count indicating which patient is selected and the total number of patients currently listed in the subject listbar.



5.6 Auto-select Subject Event

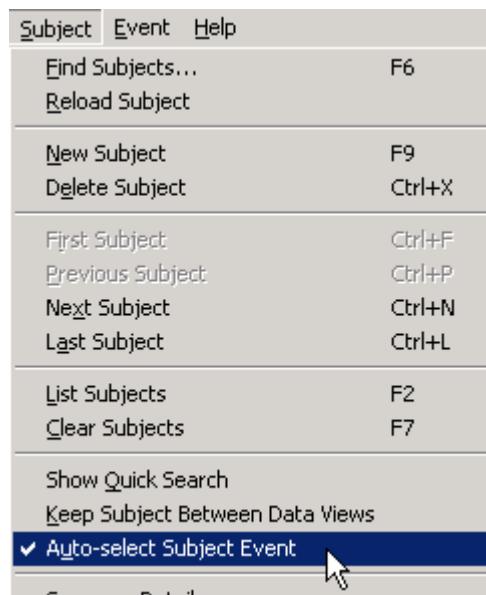
Normally, when you select a new patient, no data items are displayed for that patient, and a message is displayed in the centre of the **Screens** tab.

No subject event(s) selected

In order to see the data items, an event needs to be selected on the patient's subject overview.

However, if you switch on the **Auto-select Subject Event** function, when you select the next patient you wish to view, the event that you were viewing for the last patient will automatically be selected for the next patient you choose, and the data items will be displayed, as long as that event exists for the next patient. If no patient was previously selected, the root event will be displayed.

Go to the **Subject** menu and ensure that **Auto-select Subject Event** is switched on.

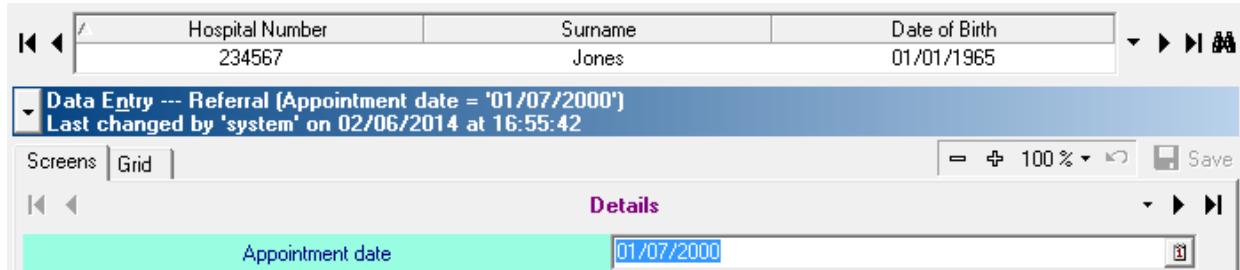


Select patient **123456 Green** from the subject listbar.

Select the **Referral** event so that the data items are displayed.

Now select patient **234567 Jones** from the subject listbar.

Note that the Referral event is also displayed for this patient.



The screenshot shows the InfoFlex Data Entry software interface. At the top, there is a header bar with buttons for navigating between subjects. Below this is a table with three columns: 'Hospital Number' (234567), 'Surname' (Jones), and 'Date of Birth' (01/01/1965). A blue header bar above the main content area displays the text 'Data Entry --- Referral (Appointment date = '01/07/2000')' and 'Last changed by 'system' on 02/06/2014 at 16:55:42'. The main content area is titled 'Details' and contains a single row with the label 'Appointment date' and the value '01/07/2000'. The interface includes standard window controls (minimize, maximize, close) and a zoom percentage indicator (100%).

Notes

If the last event viewed does not exist for the next patient chosen, then the root event will be selected on the subject overview for the next patient.

If no subject was previously selected, the root event will be displayed for the next patient chosen.

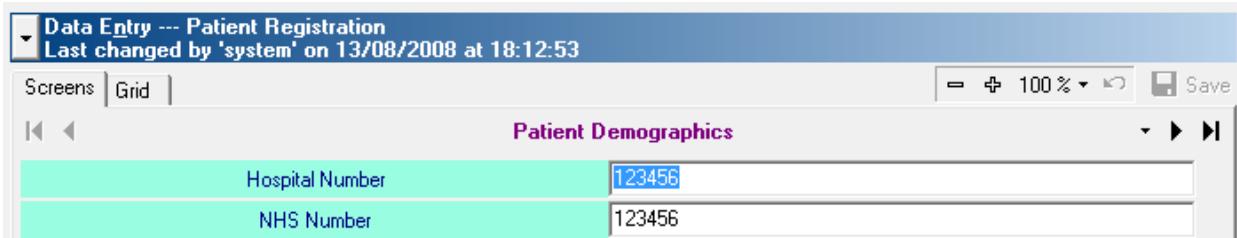
When the **Keep Subject Between Data Views** option is also enabled, an event will be automatically selected when changing data views in Data Entry.

5.7 Keep subject between data views

Normally, selecting a data view would clear the selected patient and require a fresh patient search to be carried out before any patients can be viewed.

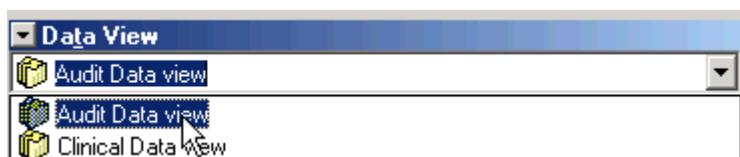
However, if the **Keep subject between data views** function is switched on, then the last patient viewed in a data view will automatically be displayed on selecting a new data view, as long as that patient exists in the new data view and the data views belong to the same domain.

In the clinical data view, select patient **123456 Green**.

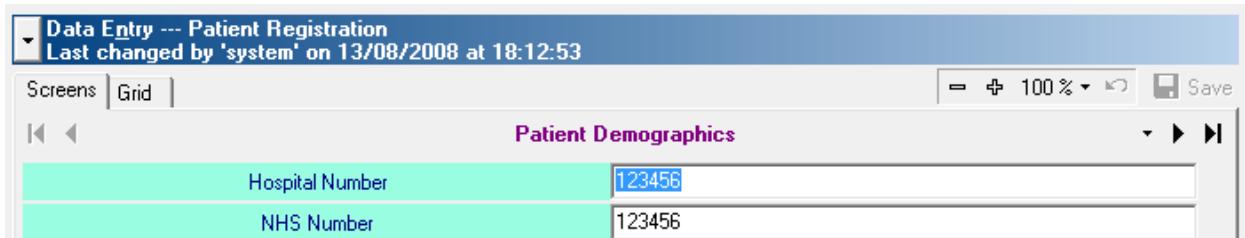


The screenshot shows the 'Patient Demographics' view in the Data Entry --- Patient Registration application. The title bar indicates the last change was made by 'system' on 13/08/2008 at 18:12:53. The interface includes a toolbar with 'Screens' and 'Grid' buttons, a zoom control (100%), and a 'Save' button. The main area displays patient information in a table format. The 'Hospital Number' field is populated with '123456' and the 'NHS Number' field is also populated with '123456'.

Select the **Audit data view**.



Note that the patient **123456 Green** is automatically selected when the **Audit Data view** is displayed.



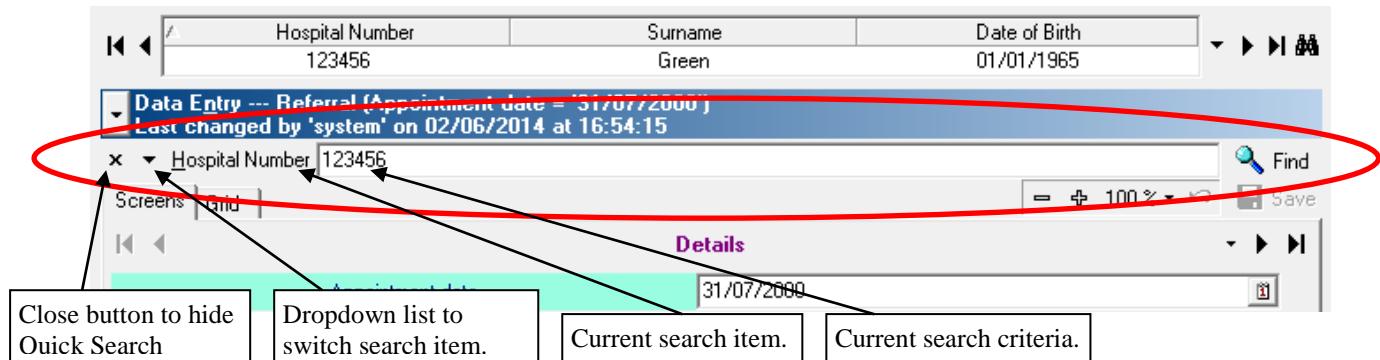
The screenshot shows the 'Patient Demographics' view in the Data Entry --- Patient Registration application. The title bar indicates the last change was made by 'system' on 13/08/2008 at 18:12:53. The interface includes a toolbar with 'Screens' and 'Grid' buttons, a zoom control (100%), and a 'Save' button. The main area displays patient information in a table format. The 'Hospital Number' field contains '123456' and the 'NHS Number' field contains '123456'.

6 MORE SEARCHING FUNCTIONS

6.1 Quick Search

Switch on **Show Quick Search** on the **Subject** menu to display the Quick Search.

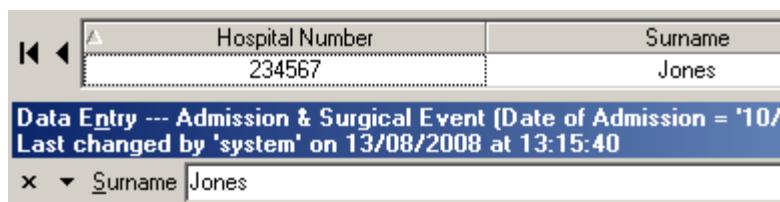
Quick Search displays one search criteria item, allowing you to quickly search the data view by that item without having to use F6 or the find button to display the whole Subject Search window. You can select which item is the search criteria by using the dropdown list. The dropdown list contains the primary and secondary identifiers of the domain.



Click the dropdown arrow against **Hospital Number** and select to search by **Surname**.

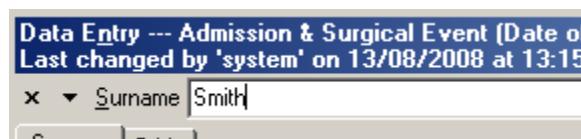


Type **Jones** in the **Surname** box then press return.

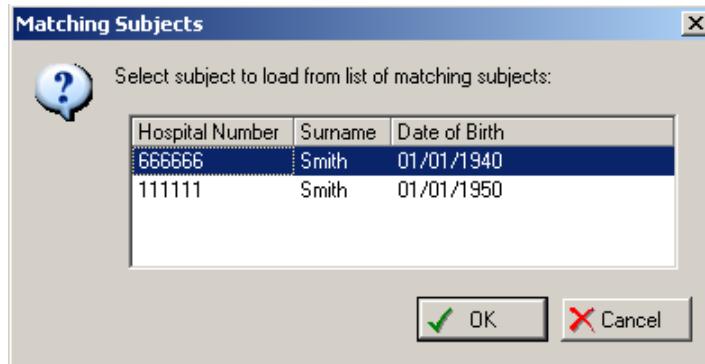


The patient Jones is displayed.

Type **Smith** in the **Surname** box then press return.



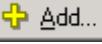
Since there are several patients with the surname **Smith**, each of them is displayed in the **Matching Subjects** window.



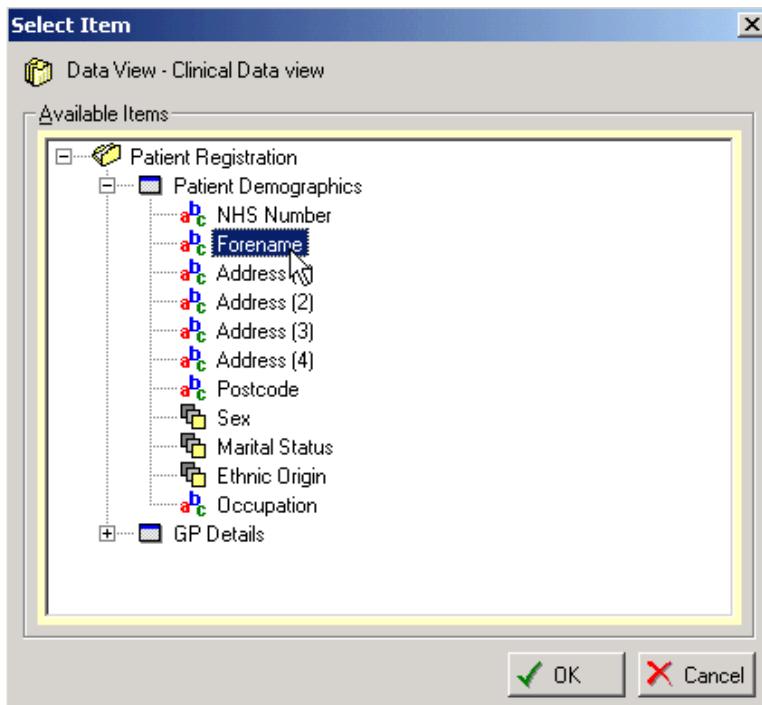
Double click one of the patients to display the details.

6.2 Adding additional search criteria

Press **F6** or click the **Find** button on the toolbar. 

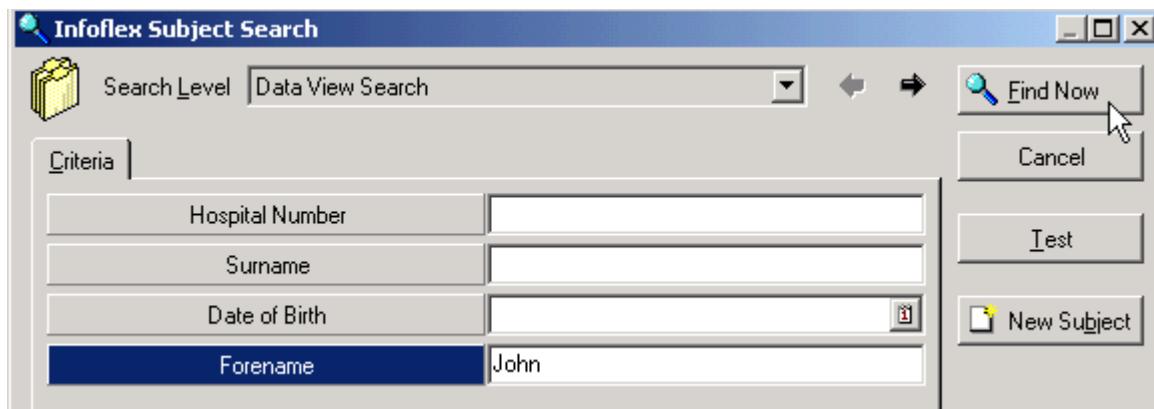
Press the  button.

Expand the Patient Demographics panel then select **Forename** and click **OK**.



Forename is now temporarily added to the available search criteria.

Search for patients with the forename **John**.



Select the patient **John Jones**.

Subjects (2)		
Hospital Number	Surname	Date of Birth
234567	Jones	01/01/1965
333333	Joseph	01/01/1985

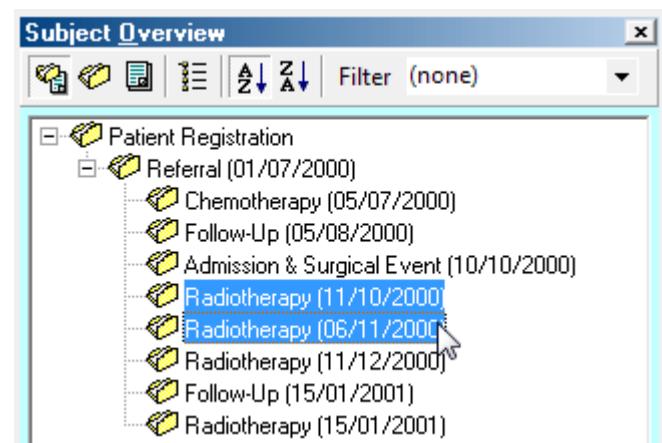
7 MORE VIEWING FEATURES

7.1 Grid view

Select the **Grid** tab to view the patient in grid view.



Select a Radiotherapy event in the subject overview, then hold down the **ctrl** button on the keyboard and select another radiotherapy event.



Both selected events are displayed in the grid.

Screens		Grid	
		Radiotherapy	11/10/2000 06/11/2000
	Details	Date of this radiotherapy	11/10/2000 06/11/2000
		Type of radiotherapy	1 - Type B 1 - Type B
		If other, please specify:-	
		Planned number of courses	4
		Dose at this appointment	2000 ** 2000 **
		Complications	0 - None 0 - None
		Other complications, please specify	
		Next session in:-	05 weeks 05 weeks

Choose **Select Similar events** on the **Event** menu. All Radiotherapy events displayed.

Screens		Grid	
		Radiotherapy	11/10/2000 06/11/2000 11/12/2000 15/01/2001
	Details	Date of this radiotherapy	11/10/2000 06/11/2000 11/12/2000 15/01/2001
		Type of radiotherapy	1 - Type B 1 - Type B 1 - Type B 1 - Type B
		If other, please specify:-	
		Planned number of courses	4
		Dose at this appointment	2000 ** 2000 ** 2000 ** 2000 **
		Complications	0 - None 0 - None
		Other complications, please specify	
		Next session in:-	05 weeks 05 weeks 05 weeks

Right click the grid and use the **Column width** menu to resize the columns.

Note that if you wish to switch between **Grid** and **Screens** view for data entry, you must save any data that you have entered before switching to Screens or Grid.

Select the **Screens** tab.

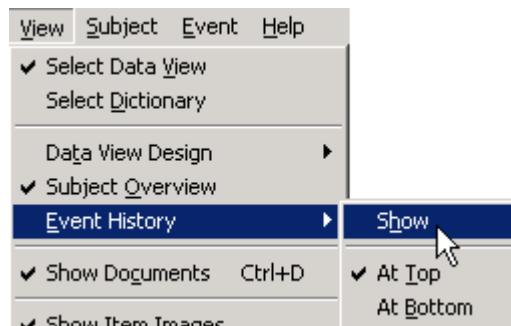


7.2 Event History

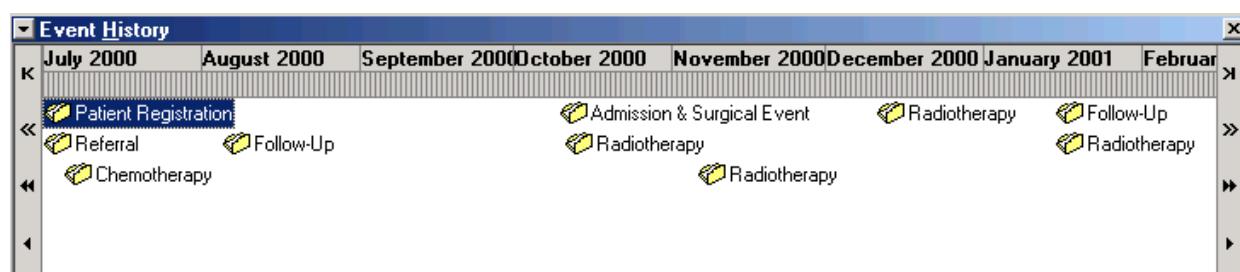
The Event History is an alternative way of displaying the Subject Overview. The events that have occurred for a patient are displayed along a time line and are displayed by date rather than by event relationship.

The Event History behaves in the same way as the Subject Overview, in that selecting an existing event will display the data items for that event, and new events can be attached by selecting the parent on the Event History and then proceeding in the usual way.

On the **View** menu, select **Event History** then **Show**.



The subject overview is displayed along a horizontal timeline. Each event is positioned according its date. Non-repeat events are positioned at the date of the first dated event in the subject overview.



You can select an event on the timeline to display the data entry items for that event.

From the dropdown list choose **Frequency** then **3 months**.



Three months are now displayed across the width of the timeline.



From the dropdown list, switch on **Show Dates**.



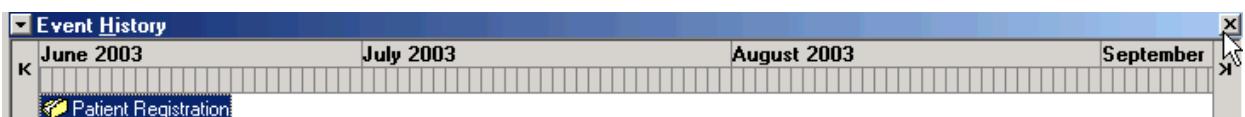
The date of each repeat event is now displayed on the timeline.



Use the arrows to navigate through the subject overview:

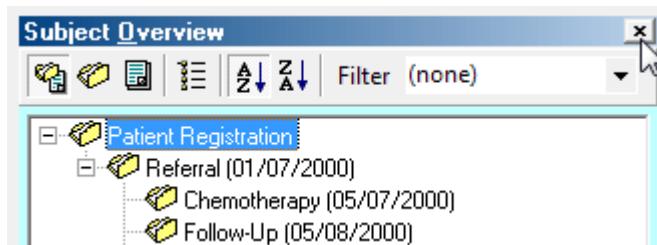
◀	Go to first event	▶	Go to last event
◀◀	Scroll back by event	▶▶	Scroll forward by event
◀◀◀	Scroll back by screen width	▶▶▶	Scroll forward by screen width
◀◀◀◀	Scroll back by day	▶▶▶▶	Scroll forward by day

Hide the Event History timeline by using **x** in the top right corner of the Event History.



7.3 Hiding Subject Overview, Data View design and Event History

Use the **close** buttons  to close the **Subject overview**, the **Data View design** and the **Event History**.



7.4 Displaying Subject Overview, Data View design and Event History

To display the **Data View Design**, go to the **View** menu and select **Data View Design** then **Show**.

You can also switch the Data View Design on and off by using the **Show data view design** button.



To display the **Subject Overview**, go to the **View** menu and select **Subject Overview**.

You can also switch the Subject Overview design on and off by using the **Show subject overview** button.



To display the **Event History**, go to the **View** menu and select **Event History** then **Show**.

You can also switch the Event History on and off by using the **Show event history** button.

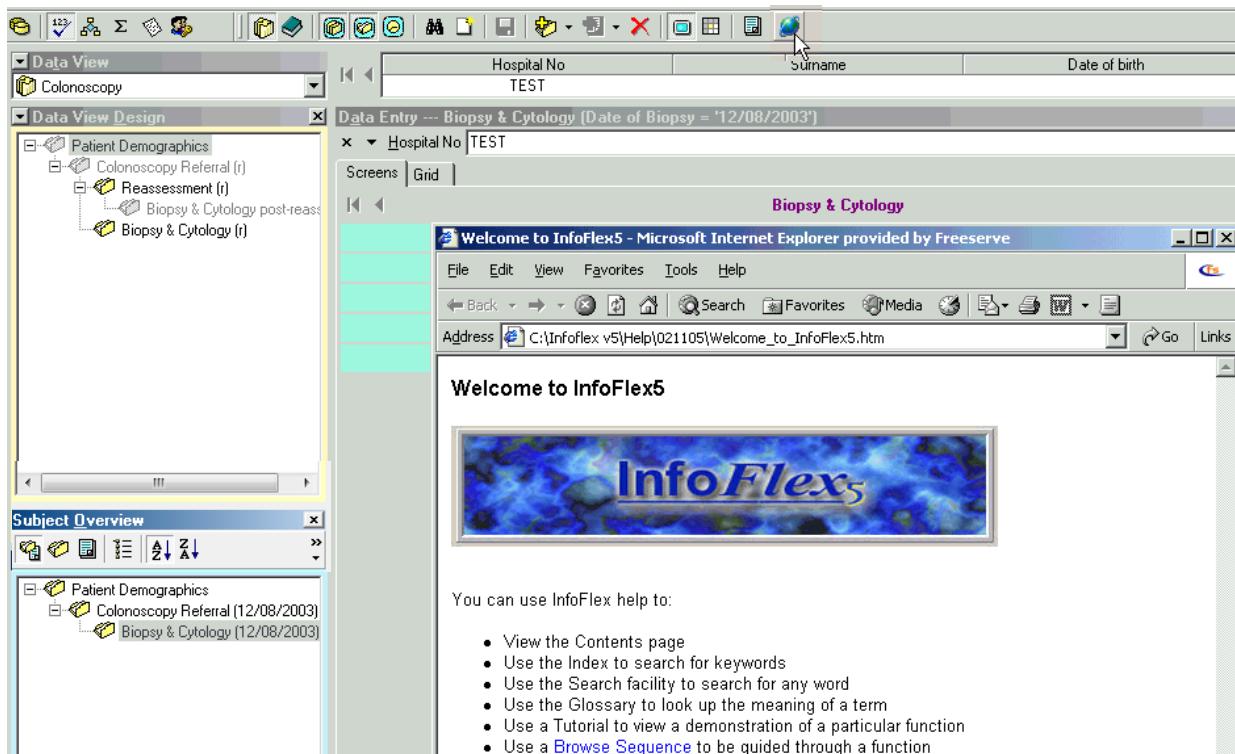


7.5 Open web page (events)

Sometimes when you select a particular event in the patient's subject overview, the **Open web page**  button on the toolbar will be enabled. This means there is a webpage available to be viewed. It might be a page that exists on your PC, or on a server, or on the internet.

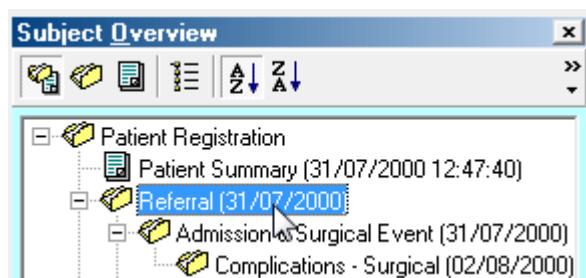


When you press the  button, the web page will be displayed on the screen in your web browser.

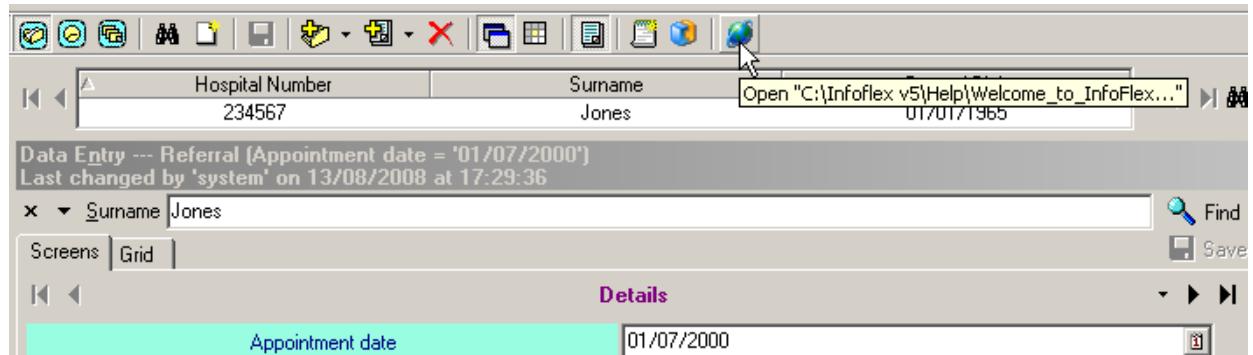


In the **Clinical Data view**, find patient **123456**.

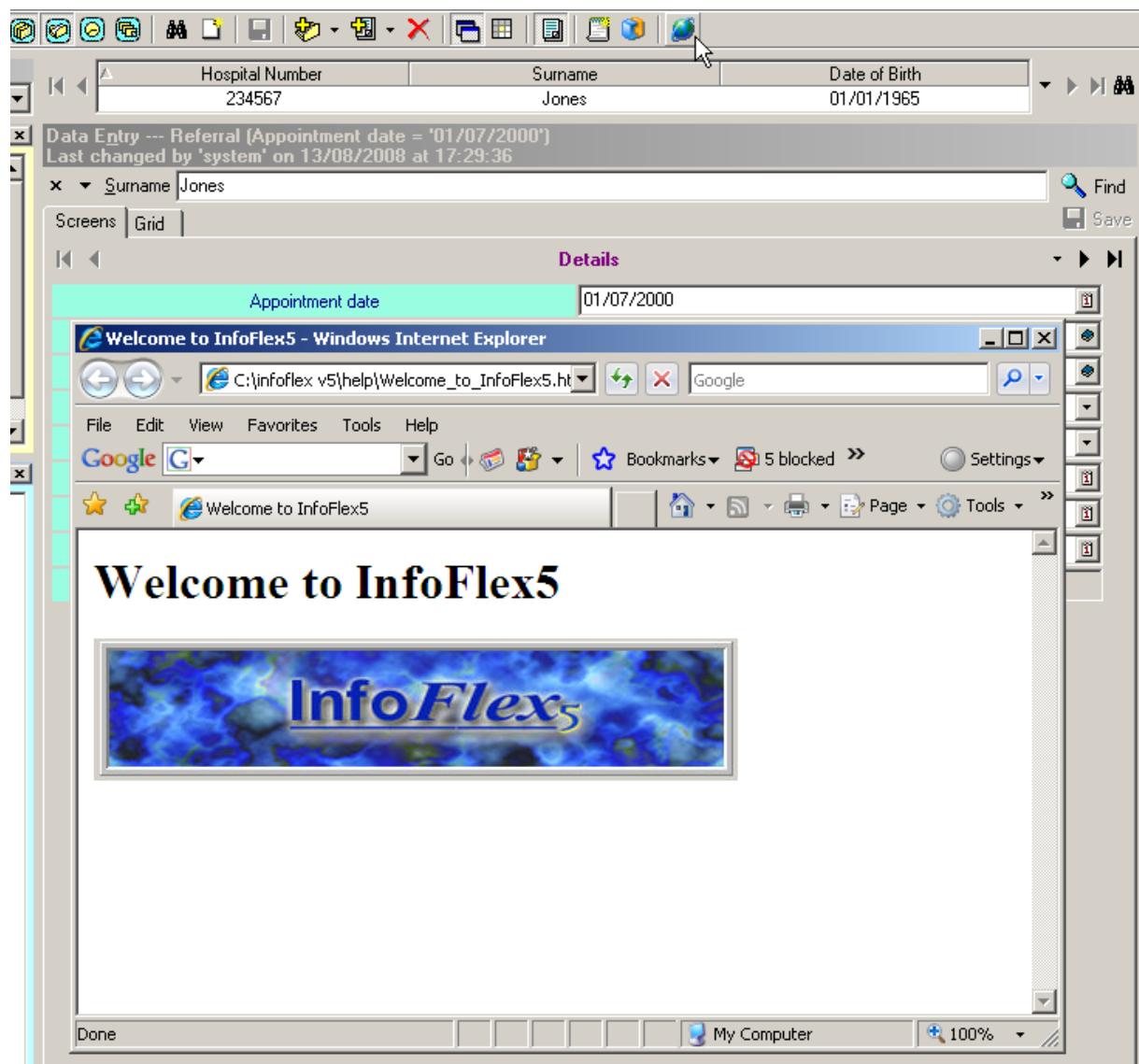
Select the **Referral** event in the patient's subject overview.



The **Open web page** button on the toolbar becomes enabled, and the tooltip text displays the name of the page that will be opened.



Click the **Open web page** button.



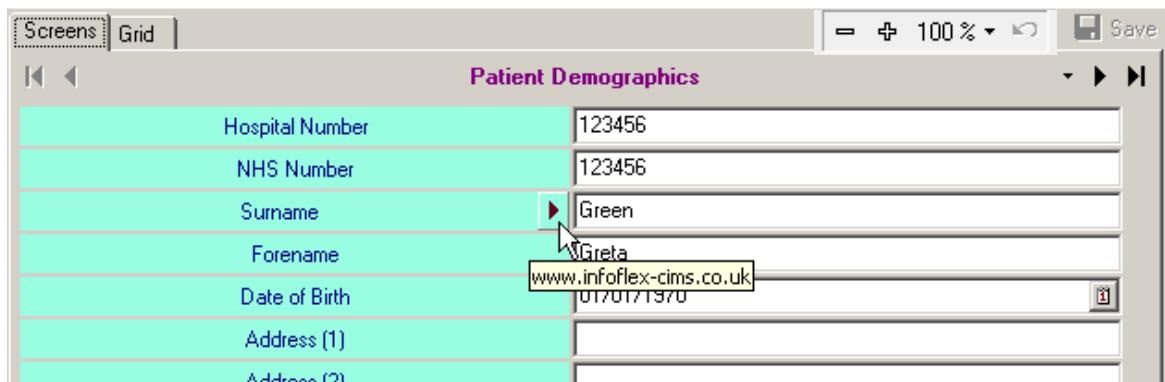
The web browser opens, displaying the web page.

Close the web page.

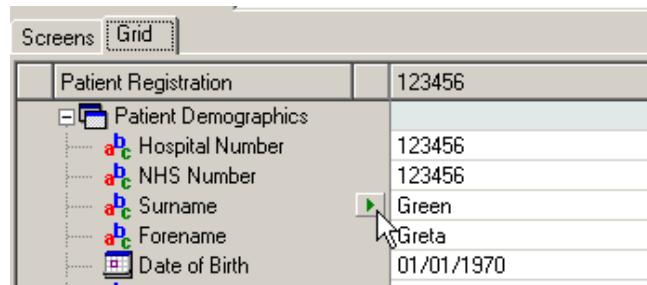
7.6 Open web page (items)

Web pages can also be assigned to individual items.

If a URL has been set for an item, then a link button  is now displayed at the right hand side of the field's label in both screen and grid mode. (The link button is an arrow symbol in the inverse of the background colour of the label.) Hovering over the button displays the URL for the button. Clicking the button opens the URL in the default internet browser. The keyboard shortcut **Ctrl + A** can be used to open the web browser if the cursor is in the field that has the URL.



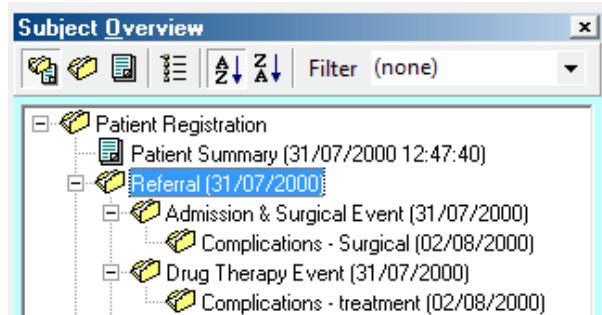
Patient Demographics	
Hospital Number	123456
NHS Number	123456
Surname	Green
Forename	Greta
Date of Birth	01/01/1970
Address (1)	
Address (2)	



Patient Registration	
123456	
Patient Demographics	
ab Hospital Number	123456
ab NHS Number	123456
ab Surname	Green
ab Forename	Greta
ab Date of Birth	01/01/1970

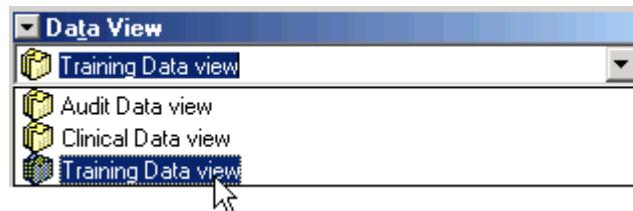
7.7 Event images

The standard image for an event in the subject overview is a yellow folder:

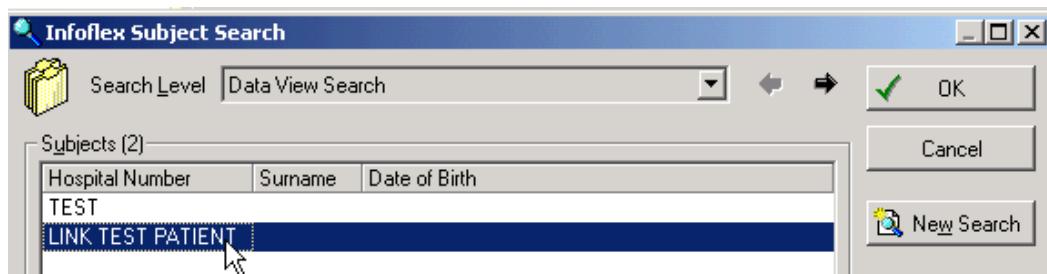


However, some events may have been set to be displayed in a different coloured folder or an image. Different images can be assigned to each different type of event.

Select the **Training data view**.

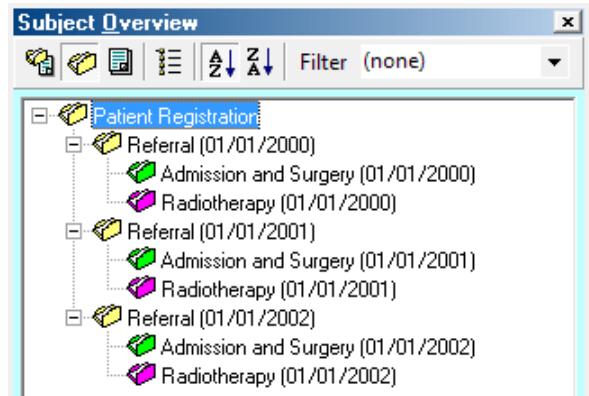


Search for all patients in the data view and select the **LINK TEST PATIENT**.

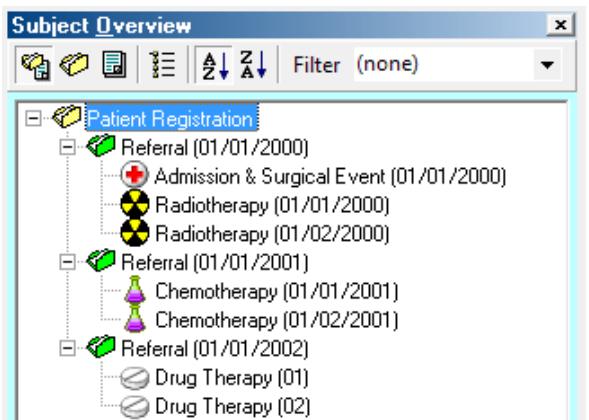


The subject overview looks like this:

In design management, Admission and Surgery events have been set to display with a green folder, and Radiotherapy events have been set to display with a pink folder.



Other images can be defined. For example:



7.8 Panel layouts

All the screen shots in the manual use the default style of panel layout which is one column of items. The screen background is grey the item labels are green.

The screenshot shows a standard InfoFlex Data Entry panel layout. The title bar reads "Data Entry --- Referral (Appointment date = '31/07/2000') Last changed by 'system' on 01/09/2010 at 17:43:54". Below the title bar is a search bar with "Hospital Number 123456" and buttons for "Find" and "Save". The main area is titled "Details" and contains a table of items:

Appointment date	31/07/2000
Hospital Name	RA1 - EPSOM HEALTH CARE NHS TRUST
Consultant	Z1230004 - Brown
Source of Referral	4 - General Physician
Category	0 - NHS
Date of Referral	27/07/2000
Date referral received	27/07/2000
1st available appointment	31/07/2000
Days from referral to appointment	004 days

However it is possible for panel layouts to be customised. The size and layout of the items can be adjusted and the colours and fonts can also be adjusted. Buttons, frames and pictures can all be added. Items from parent events can be displayed for reference.

Below are some examples of customised panel layouts:

The screenshot shows a customised InfoFlex Data Entry panel layout with a blue background. The title bar reads "Referral & Date First Seen Details". The main area contains a grid of items and a table for "Suspension periods to remove from Waiting Times".

Source of Referral for Out-Patients			
Cancer Referral Decision Date *			
Dummy Referral Request Received Date			
Referral Request Received Date *	03/08/2009 12...	Age at Referral	039
Cancer Referral Priority Type *			
Urgent Cancer Referral Type *			
Date First Seen *			
Organisation Code (provider first seen)*			
Consultant First Seen			
Decision to Refer to Receipt of Referral			

Suspension periods to remove from Waiting Times

	Start of Suspension	End of Suspension	Total days	Adjustment Reason
1st				
2nd				
3rd				
4th				
5th				

Here is another example of a customised panel layout:

Screens | Grid |

Cancer Monitoring details

Referral summary details

Ref Request Received Date 03/08/2009 12:25	Patient Pathway Identifier	Priority Type
Original Ref Req Rec Date	Referral Type	
	Source of Ref OP	
	Decision to Refer to Receipt of Referral	Age at Referral 039

Decision to Treat Date (Surgery) 03/08/2009	Earliest Clinically Appropriate Date	Cancer Treatment Period Start Date 03/08/2009	Predicted Cancer Treatment Target Date	Treatment Start Date (Cancer)
--	--------------------------------------	--	--	-------------------------------

Organisation Code (Provider Decision to Treat (Cancer))

Cancer Treatment Modality 01 - Surgery	Date patient declined the treatment
---	-------------------------------------

Start Date (Surgery Hospital Provider Spell)

Organisation Code (Provider Treatment Start Date (Cancer))

Cancer Treatment Event Type
Cancer Care Setting (Treatment)
Clinical Trial Indicator

Waiting Time adjustment & Breach Details

Duration (non adjusted) Cancer Treatment Period 000 Days	Waiting Time Adjustment (Treatment) days <input type="button" value="+"/> <input type="button" value="-"/>	Waiting Time Adjustment Reason (Treatment)
Duration (adjusted) Cancer Treatment Period 000 Days	Treatment Target Being Met? <input checked="" type="checkbox"/>	Delay Reason (Decision To Treatment)
		Delay Reason Comment (Decision To Treatment)

You can zoom in and out using the zoom controls next to the save button.



8 ADDING EVENTS

To add an event to a patient, ensure that you first highlight the parent or a same-level event in the subject overview (the parent event is the event you wish to attach a new event to).

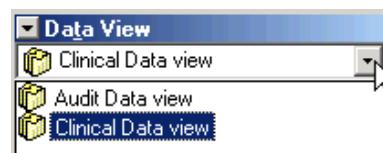
When you highlight a parent or same-level event, the **Data View design** will display in yellow all those events which it is possible to add to the selected even in the patient's **subject overview**. Any events or documents which you cannot add because they do not have the correct relationship are disabled.

There are several different ways in which to add an event to the subject overview.

See also section 8.7 Event protection

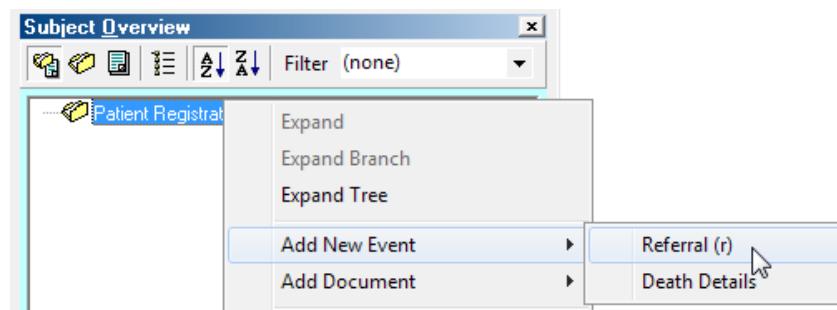
8.1 Adding events 1 – right click Subject Overview

Select the **Clinical data view**.



Find patient 111111 Smith.

Right click the **Patient Registration** event in the **Subject overview** and select **Add New Event** then **Referral**.



Click OK to the confirmation message.

The event appears in the Subject Overview with (NEW) in brackets to indicate that it is a new event that has not yet been saved.



The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Referral** event. (See Appendix A for details of how to enter data in each item).

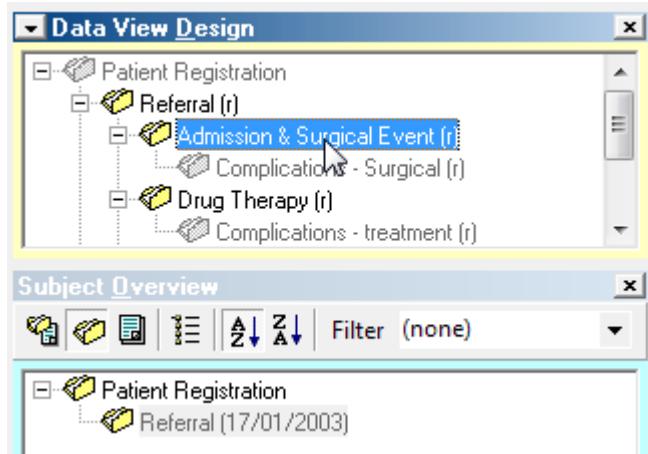
Press the **Save** button  or **F5** to save the data. (See Appendix B for more information about the **Save** function).

When you save the data, the subject overview displays the date entered in the identifier item next to the name of the event.



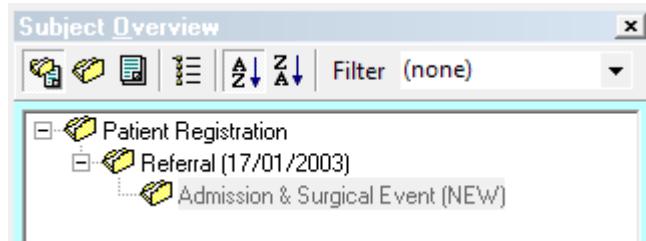
8.2 Adding events 2 – double click Data View design

Select the **Referral** event in the **Subject Overview** then in the **Data View Design**, double click the **Admission & Surgical Event**.



Click OK to the confirmation message

The event appears in the Subject Overview with (NEW) in brackets to indicate that it is a new event that has not yet been saved.



The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Admission & Surgical Event** event. (See Appendix A for details of how to enter data in each item).

Add a new entry to the dictionary in the **Surgeon** item.

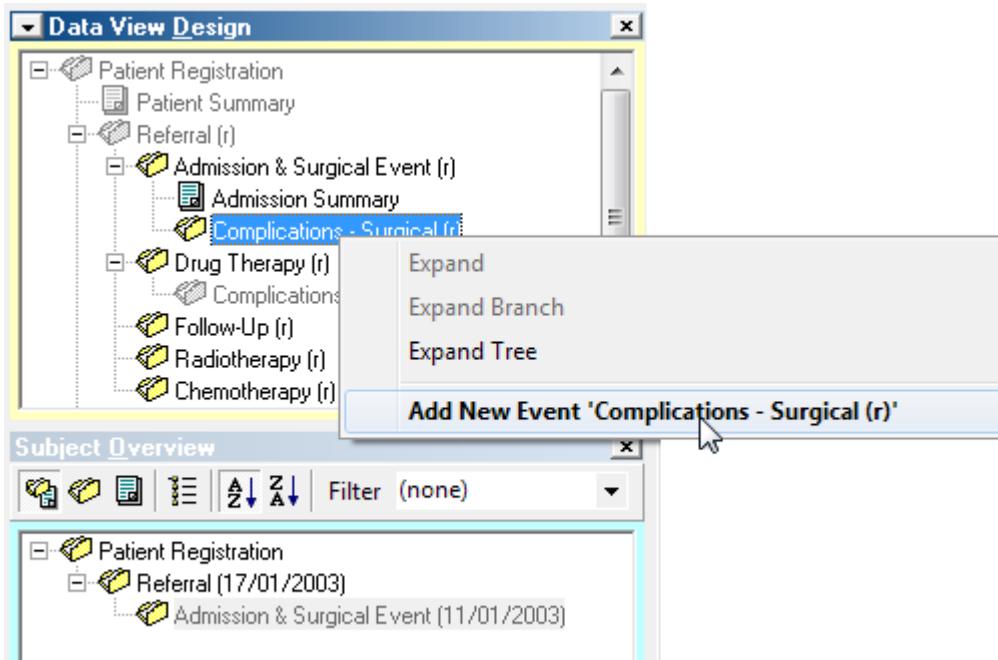
Press the **Save** button  or **F5** to save the data. (See Appendix B for more information about the **Save** function).

When you save the data, the subject overview displays the date entered in the identifier item next to the name of the event.

8.3 Adding events 3 – right click Data View design

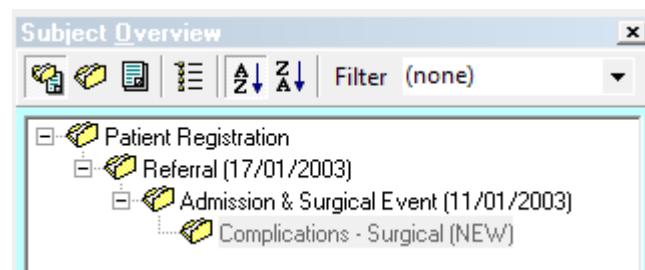
Select the **Admission & Surgical Event** in the **Subject Overview**.

In the **Data View design**, right click the **Complications – Surgical** event and select **Add New Event ‘Complications – Surgical (r)’**



Click OK to the confirmation message

The event appears in the **Subject Overview** with (NEW) in brackets to indicate that it is a new event that has not yet been saved.



The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Complications – Surgical** event. (See Appendix A for details of how to enter data in each item).

Press the **Save** button  or **F5** to save the data. (See Appendix B for more information about the **Save** function).

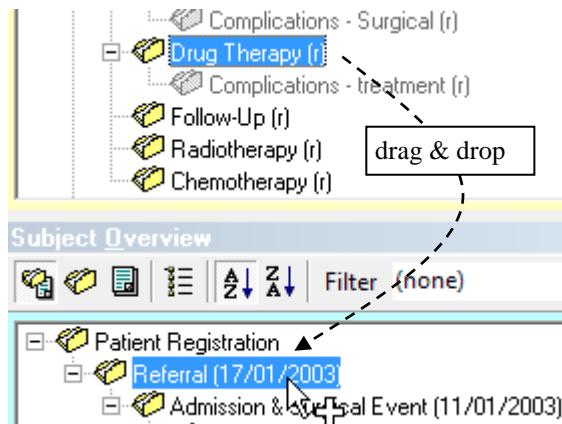
When you save the data, the subject overview displays the date entered in the identifier item next to the name of the event.

8.4 Adding events 4 – drag and drop

In the **Subject Overview**, select the **Referral** event.

From the Data View Design, drag the **Drug Therapy Event** and drop it on the **Referral Event** in the **Subject Overview**.

A plus symbol appears when the mouse is over an event which **Drug Therapy** can be attached to.



Release the mouse when **Referral** is highlighted in the **Subject Overview** and there is a plus symbol.

Click OK to the confirmation message

The event appears in the Subject Overview with (NEW) in brackets to indicate that it is a new event that has not yet been saved.



The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Drug Therapy** event. (See Appendix A for details of how to enter data in each item).

Press the **Save** button  or **F5** to save the data. (See Appendix B for more information about the **Save** function).

When you save the data, the subject overview displays the date entered in the identifier item next to the name of the event.

8.5 Adding events 5 – button view

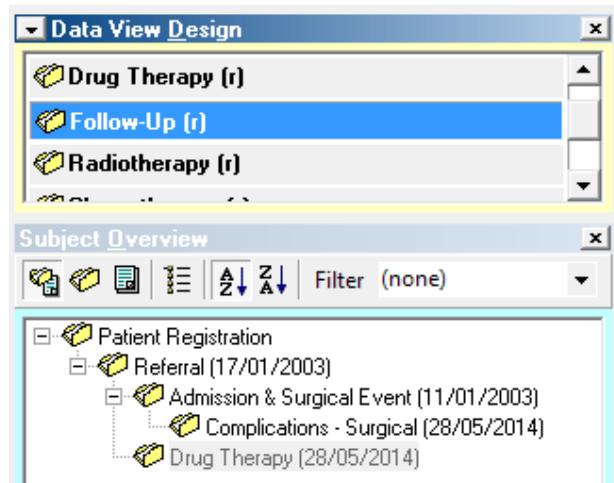
Select the **Referral** Event in the **Subject overview**.

Use the dropdown toggle on the Data View design titlebar to select **Event Buttons**.



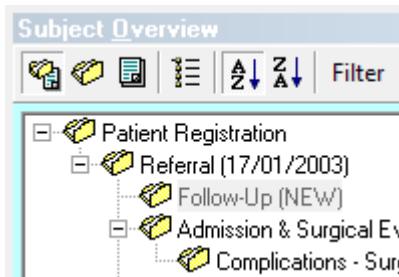
The design tree is displayed as buttons rather than as a tree. Only those events which can be added to the highlighted parent event in the **Subject Overview** are displayed.

In the Data View design, single click the **Follow-Up** event.



Click OK to the confirmation message

The event appears in the Subject Overview with (NEW) in brackets to indicate that it is a new event that has not yet been saved.



The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Follow-Up** event. (See Appendix A for details of how to enter data in each item).

Press the **Save** button  or F5 to save the data. (See Appendix B for more information about the **Save** function).

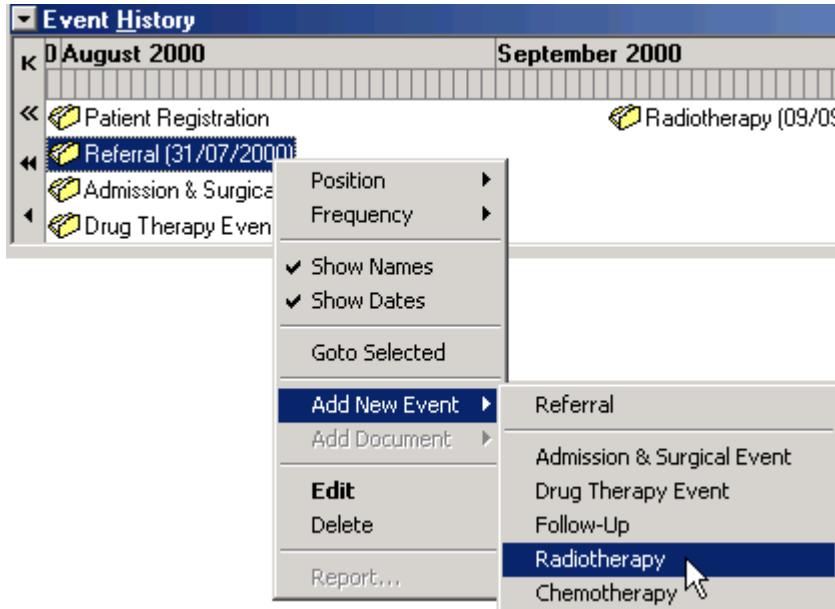
When you save the data, the subject overview displays the date entered in the identifier item next to the name of the event.

8.6 Adding events 6 – timeline

Close the **Data View** design and the **Subject Overview**.

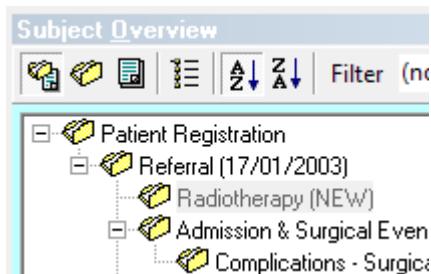
Display the Event History (from the **View** menu choose **Event History** then **Show**).

Right click the **Referral** event in the **Event History** and choose **Add New Event** then **Radiotherapy**.



Click **OK** to the confirmation message.

The event appears in the Subject Overview with (NEW) in brackets to indicate that it is a new event that has not yet been saved.



The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Radiotherapy** event. (See Appendix A for details of how to enter data in each item).

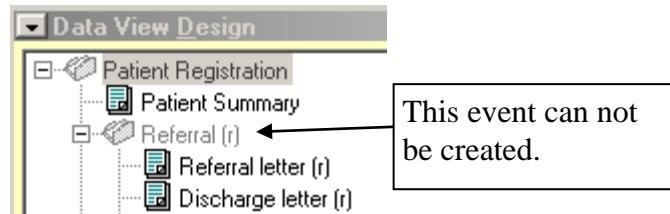
Press the **Save** button  or **F5** to save the data. (See Appendix B for more information about the **Save** function).

When you save the data, the subject overview displays the date entered in the identifier item next to the name of the event.

8.7 Event protection

Event protection settings can be made so that the user is prevented from doing any or all of the following: create the event, modify the event, delete the event.

When the event cannot be created, it is disabled in the design tree.



When the event cannot be modified, the title bar of the letter shows that it is **Protected**.



When the event cannot be deleted, a prompt message is displayed if you try to delete it.



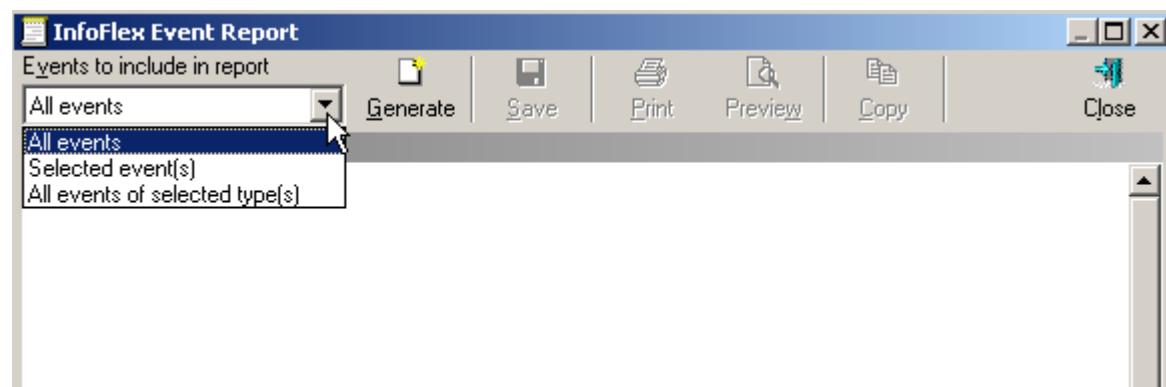
8.8 Event report

The Event Report function displays a report listing the data in all or selected events.

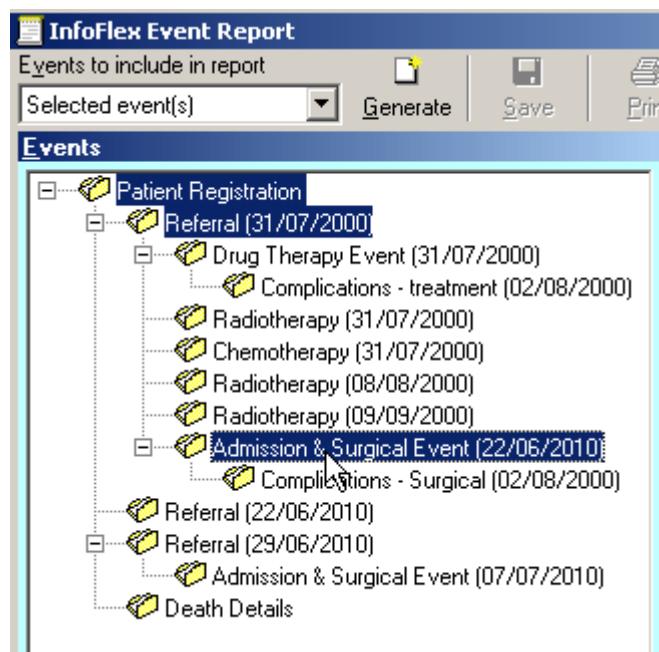
To generate an event report, press the **Generate event report** button on the toolbar.



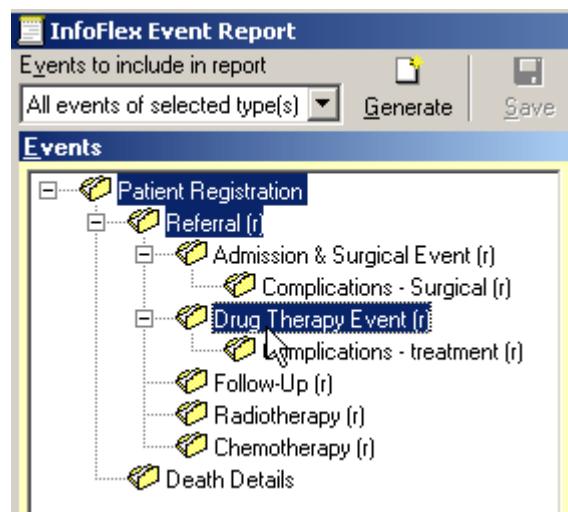
Choose whether the report should contain **All events**, **Selected event(s)** or **All events of selected type(s)**.



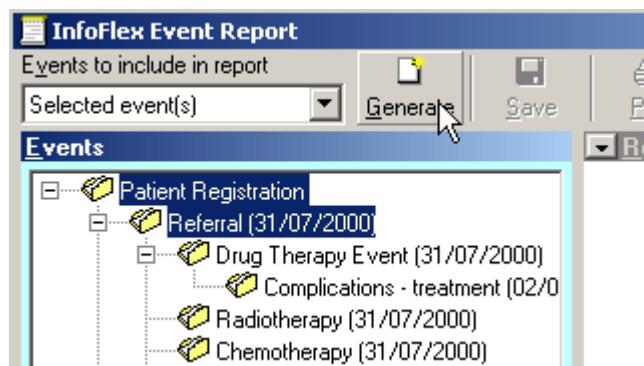
If you choose **Selected event(s)** then the patient's subject overview is displayed and you should select which events to include in the report. Use the control key to select multiple events.



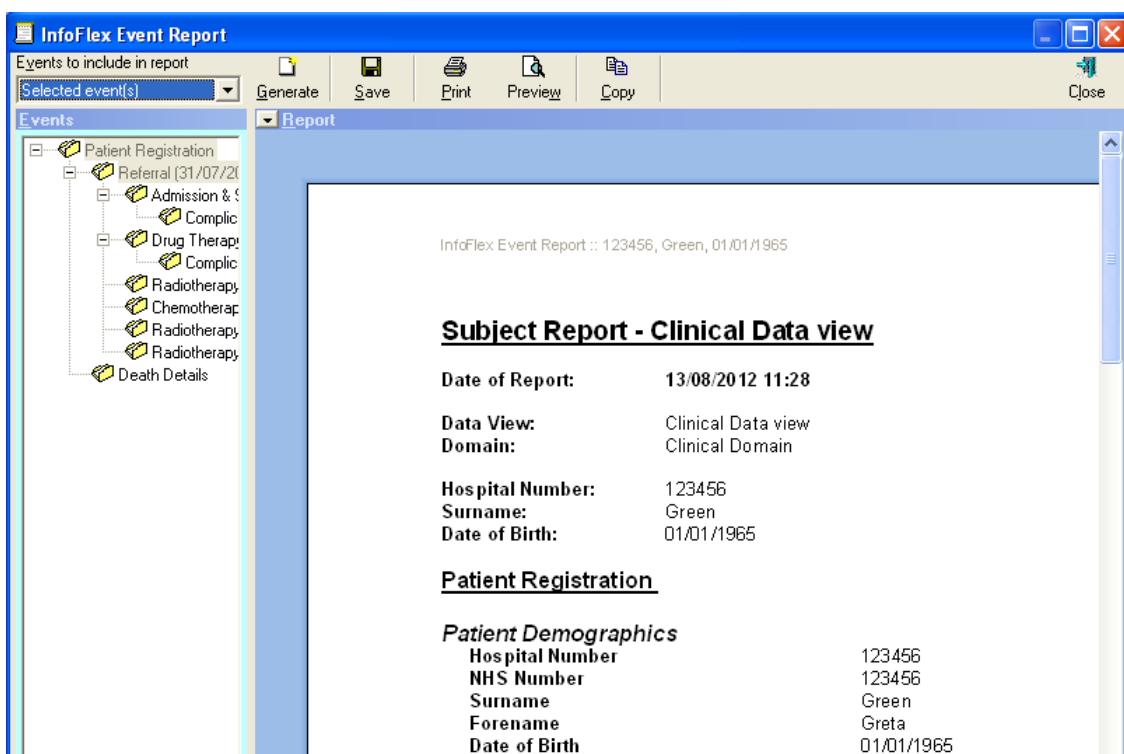
If you choose **All events of selected type(s)** then the data view design is displayed and you should select which events to include in the report. Use the control key to select multiple events. Events which have the **Hide in Subject Overview** property set to **Yes** in Design Management are available in addition to the existing events in the data view.



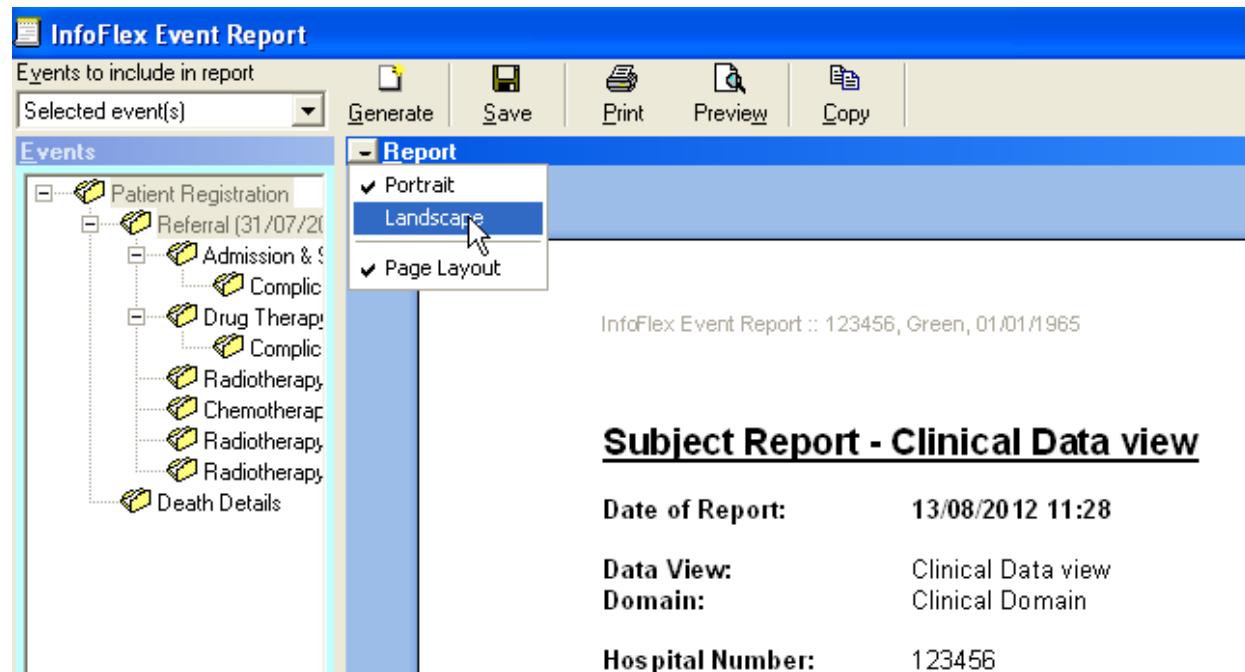
When you have made your selections, press the **Generate** button to generate the report.



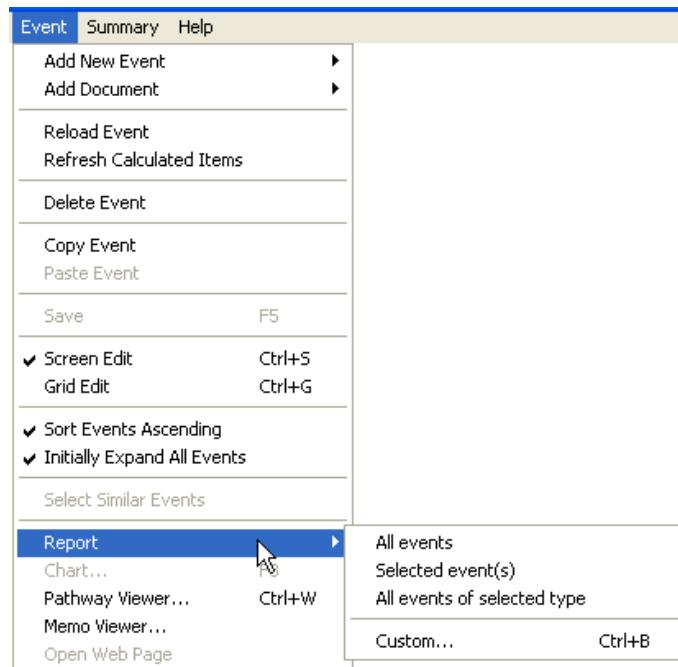
The report is displayed in the **Report** window. You can now save, print, preview or copy the report. Press the **Close** button to exit the **Event Report**.



The dropdown arrow next to the **Report** titlebar allows you to switch between portrait and landscape, and to view the report in **Page Layout** mode.



You can also generate reports by going to the **Event** menu and choosing **Report** and one of the options.

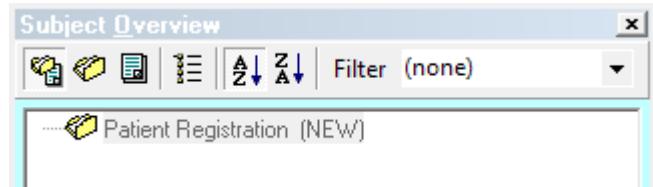


When you choose **Selected event(s)** or **All events of selected type** from the menu, if an event is selected in the subject overview or if a summarised event is selected in the Summary View grid, then that event will automatically be generated in the report.

9 ADDING NEW PATIENTS

Press **F9** or click the **New Subject**  button on the toolbar.

The **Patient Registration** event appears in the Subject Overview with (NEW) in brackets to indicate that it is a new subject which has not yet been saved.

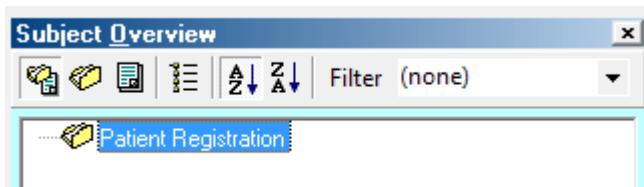


The data entry screens appear on the main screen and you can now start entering data.

Enter data in all the items in the **Patient Registration** event. (See Appendix A for details of how to enter data in each item).

Press the **Save** button  or **F5** to save the data. (See Appendix B for more information about the **Save** function).

When you save the data, the subject overview displays the name of the event without any identifying data. This indicates that the event is not a repeat event.



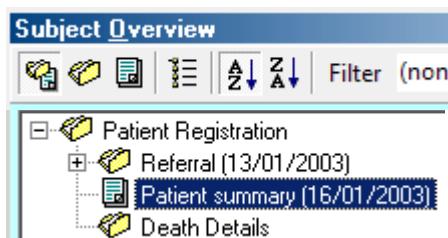
10 GENERATING DOCUMENTS

Adding a document is like adding a new event to a patient. Ensure that you first highlight the parent event in the subject overview (the parent event is the event you wish to attach a new event or document to). You can attach a document to a subject overview in all the ways that you can attach an event to a subject overview. (See appendix D for a full list).

When you highlight a parent event, the **Data View design** will show in colour all those events and documents which it is possible to add to the patient's **subject overview**. Any events or documents which you cannot add because they do not have the correct relationship are disabled.

Once you have generated a document, you need to save it, even if you do not edit it in any way. If you do not save it, the document will **not** remain on the patient's subject overview.

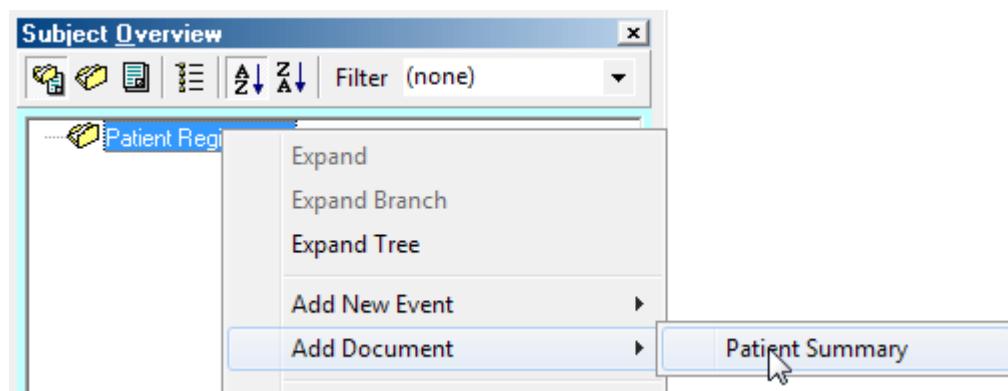
Once you save the letter, it will be displayed on the subject overview with the date of generation alongside the document name.



10.1 Adding documents 1 – right click Subject Overview

Switch on the **Show documents** button  on the toolbar. This displays documents in the **Data View Design** and **Subject Overview**.

On the subject you have just added, right click the **Patient Registration** event in the **Subject overview** and select **Add Document** then **Patient summary**.

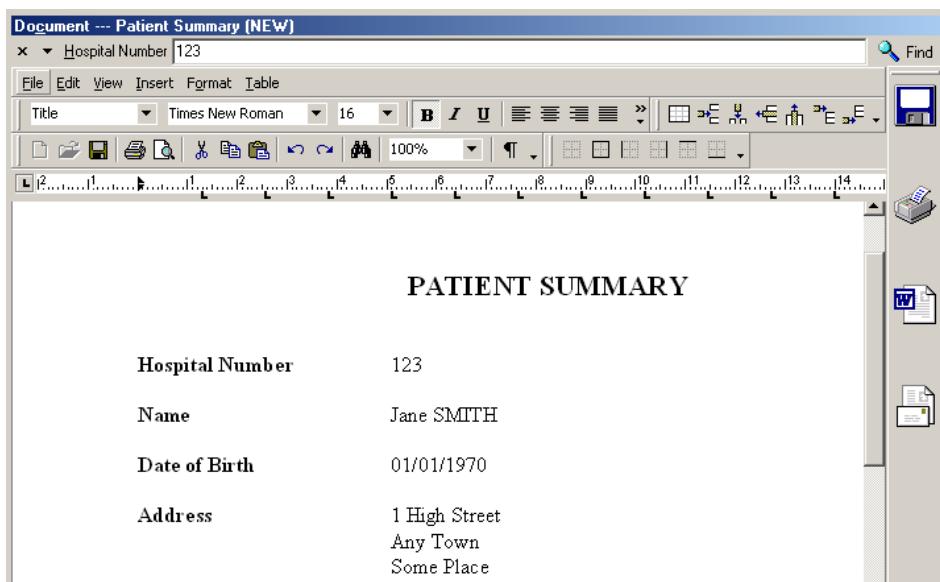


Click OK to the confirmation message.

The document appears in the Subject Overview with (NEW) in brackets to indicate that it is a new document that has not yet been saved.

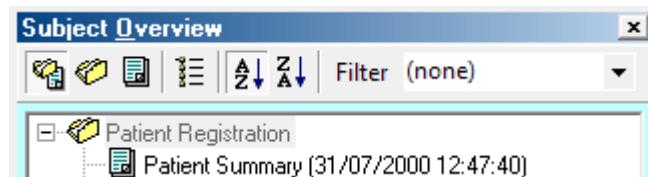


The generated document is displayed on the screen.



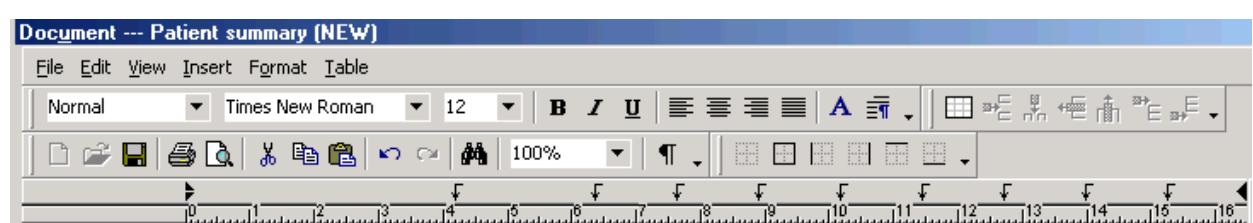
Press the **Save**  button or **F5** to save the document.

The date the document was generated is displayed in the Subject overview.



To print the document, press the **Print** button .

To edit the document, type into straight into the document, or use any of the standard editing functions on the document toolbar.



If you wish to edit the document using Word, press the **Word** button .

10.2 Other methods of adding documents

Documents can be attached to patients using all of the methods that events can be attached to patients.

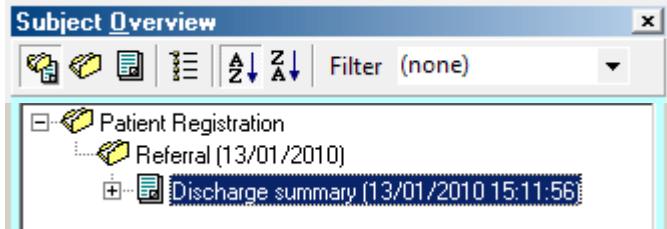
See Appendix D for examples of the other methods of adding documents to a subject overview.

10.3 Document properties

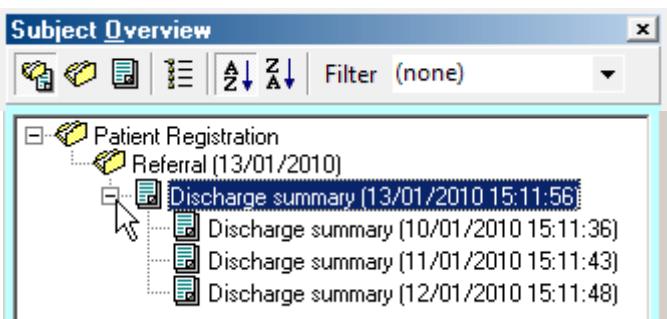
Properties can be set in design management which alter the behaviour of documents. The data entry user cannot switch these settings on or off, but the behaviour of documents in the subject overview will vary according to the settings that have been made. These are described below.

10.3.1 Show only most recent documents

If the document is set to **Show latest as parent**, then initially only the latest document is displayed in the tree. If there are any other instances of the document a plus symbol is displayed.

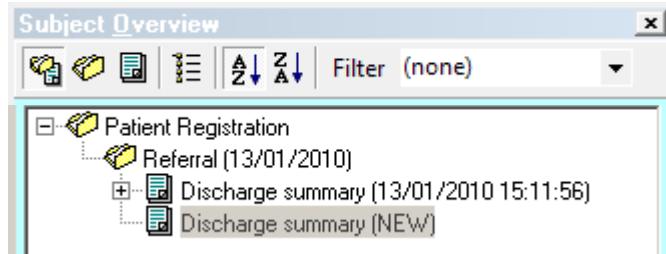


Click the + to show the historical instances of the document.



The documents attached to the parent are shown in either ascending or descending order according to the Sort Order that has been set for the subject overview.

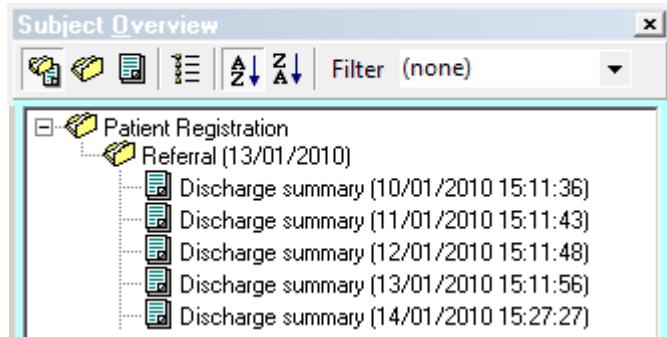
When a new document is generated and historical instances exist, the tree is collapsed and before the new document is saved it is shown in the tree at the same level as the parent document.



On saving, the new document becomes the parent document and all previous versions are attached to it.



If the document is set to **Show all**, then all instances of the document will always display in the Subject Overview tree as normal.



10.3.2 Prevent historical document from being edited

A **Lock historic documents** option can be set. This prevents all but the latest instance of the document being edited.

10.3.3 Create new document on saving

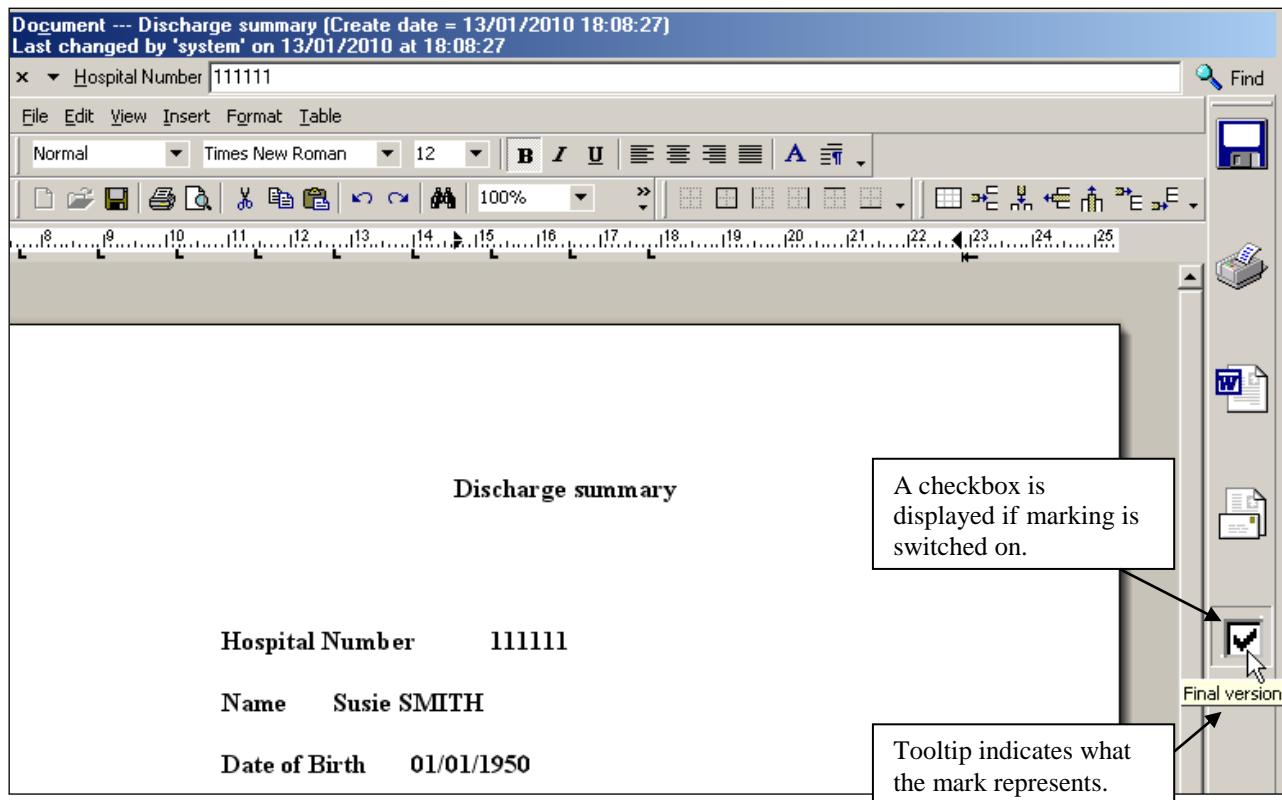
A **Create new on save** option can be set. If it is set, then every time a document is edited then saved a new document is created from the current document. Any changes made in the current document are saved in the new document and not in the current document. In this way a history of changes to the document is created.

New documents are displayed in the subject overview in accordance with the properties that have been set for the document.

10.3.4 Marking documents

It is possible for a document to be “Marked” (eg as a final version of the document).

When marking is switched on, a check box is displayed in the Document toolbar. A tooltip indicates what the mark means.



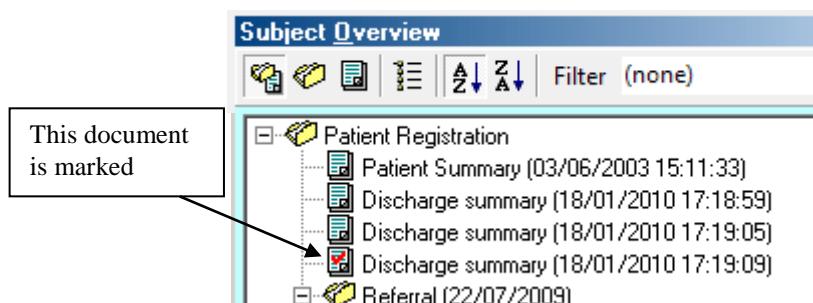
To mark a document, click in the check box. To clear a mark, click in the check box again. (Note that settings in design management control whether the user can clear a mark).

If you mark or clear a mark, the document will need to be saved.

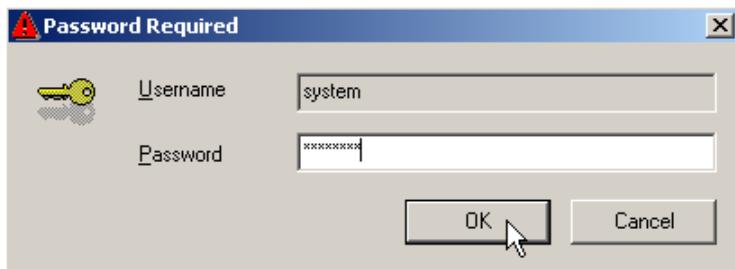
If you mark a document and the **Create new on save** function is switched on, a new instance of the document will be created.

The tooltip indicates what the mark represents.

Documents that have been marked are indicated with a red tick in the subject overview.



Users can be required to enter their password to mark or clear a mark.



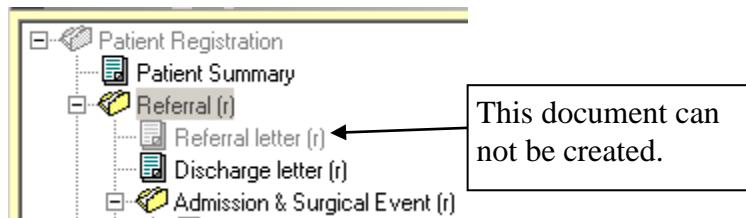
If **Marking requires password** is switched on, the document will need to be saved after the password has been entered.

Note that a document can be marked if the document is allowed to be edited, but a document cannot be marked if the Lock Historic property is set.

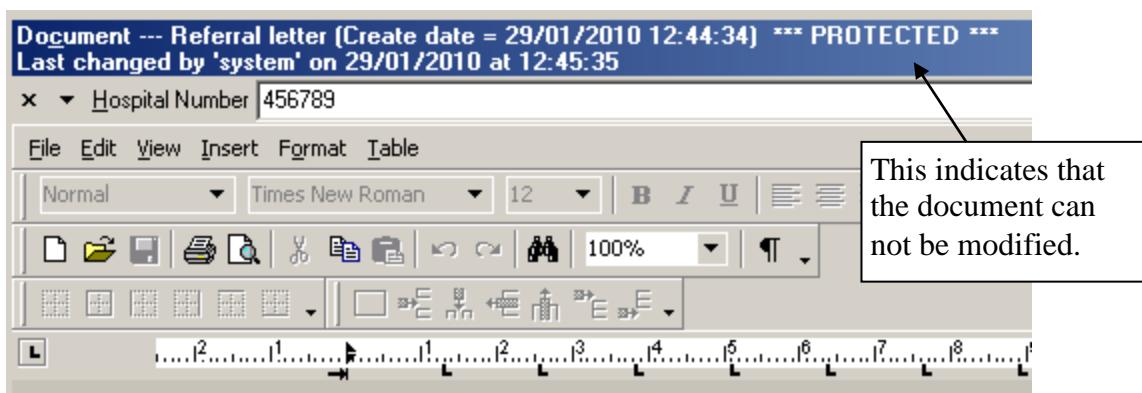
10.3.5 Document protection

Document protection settings can be made so that the user is prevented from doing any or all of the following: create the document, modify the document, delete the document.

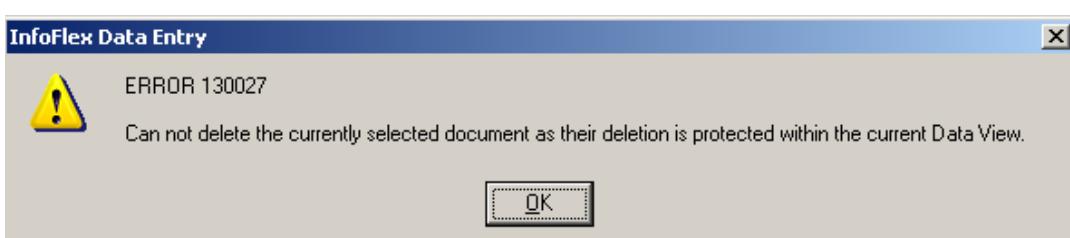
When the document cannot be created, it is disabled in the design tree.



When the document cannot be modified, the title bar of the letter shows that it is **Protected**.



When the document cannot be deleted, a prompt message is displayed if you try to delete it.



10.3.6 Behaviour after viewing or editing with Word

There is a database-wide system policy that controls how the document behaves when it has been viewed or edited with Word.

Default behaviour

When a document has been viewed or edited with Word, a message box is shown on returning to InfoFlex. The message controls whether any changes made in Word should be applied to the InfoFlex document. Even if the changes have been saved in Word, the user needs to decide whether to apply them to the InfoFlex document. Once the user has handled the message the user then needs to save the document, or choose not to save the changes by moving away from the document and choosing not to save.

If the document is editable, this message is displayed:



If the document is **not** editable, this message is displayed:



“Auto-save documents after Word” system policy

This system policy can be set in User Management. When this policy is enabled, it removes the need to save the document in InfoFlex when it has already been saved in Word and reduces the number of keystrokes required after viewing or editing a document with Word. When switched on, the policy applies to all documents across the database. The policy is switched off by default.

When the policy is enabled, when a document has been viewed or edited with Word, the message box shown when returning to InfoFlex will always show just an **OK** button. This will happen whether the document is read only or editable.

On return to InfoFlex, whether the document was saved in Word or was not changed, no further prompts are shown. If the document has been changed in Word, changes are brought into InfoFlex automatically and the InfoFlex document is saved automatically.

If the document has unsaved changes made in InfoFlex and is then viewed with Word:

- If changes are made and saved in Word, the document and event will be autosaved with no prompts, and the previous changes will also be included in this save.
- If changes are made in Word and not saved, or no changes made, the document will remain unsaved in InfoFlex and the user will need to save or be prompted on navigating away from the document.

See the **InfoFlex User Management User Guide** for details of how to switch the policy on and off. See also the **InfoFlex Document Definition User Guide**.

11 DELETING

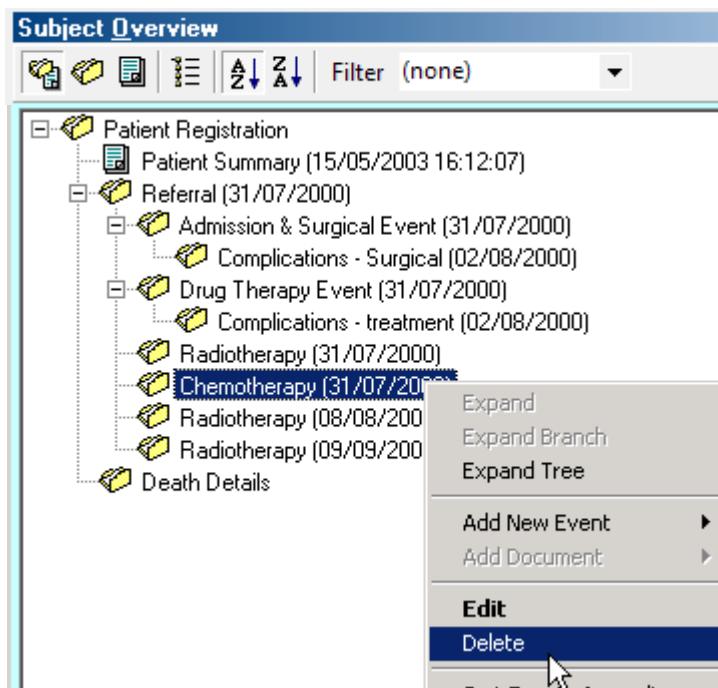
11.1 Deleting events and documents

You can delete events and documents, as long as you have been given permission to do this in User Management.

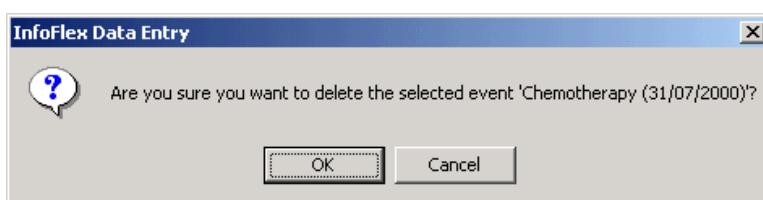
Deleting events

Select patient **123456 Green**.

Right click a **Chemotherapy** event and choose **delete**.



A confirmation message is displayed.



Click **OK** to continue with the deletion, or **cancel** to abort the deletion.

A further message warns you that the deletion cannot be undone.



Click **OK** to the message.

Deleting documents

Right click the **Patient Summary** document and choose **delete**.

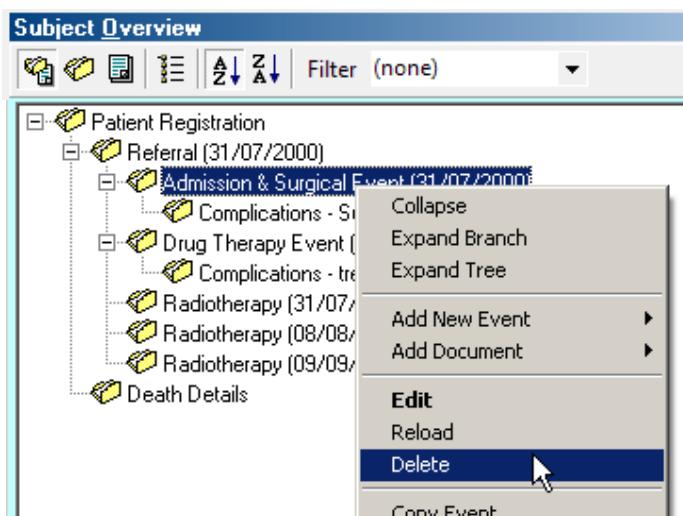


Click **OK** to the confirmation messages, or **cancel** to abort the deletion.

11.2 Deleting multiple events and documents

If you choose to delete an event which has other events and documents attached to it, **all** its child events and documents will be deleted.

Right click the **Admission & Surgical Event** and choose **delete**.



A confirmation message is displayed.



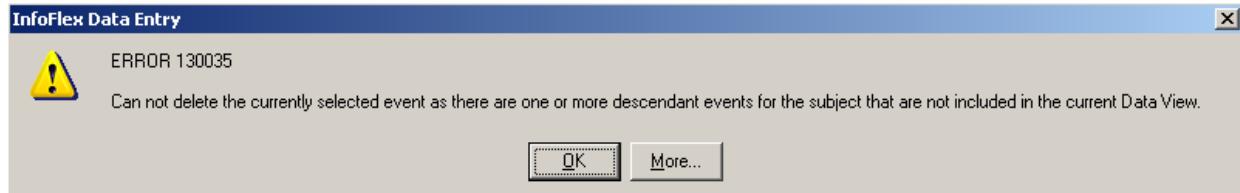
This message illustrates all the events and documents that will be deleted if you continue. All of the events displayed in the message will be deleted. If you wish to change which events you have chosen to delete, click **cancel** and start the deletion process again.

Click **OK** to continue with the deletion.

11.3 Deleting multiple events and documents where child events and documents are hidden

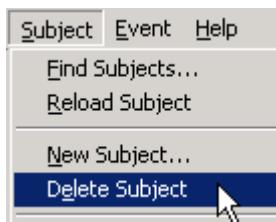
When you choose to delete an event, there may be events and documents attached to the event that are not visible in the current data view.

In this case, you may not be allowed to delete the event and the following message might be displayed:

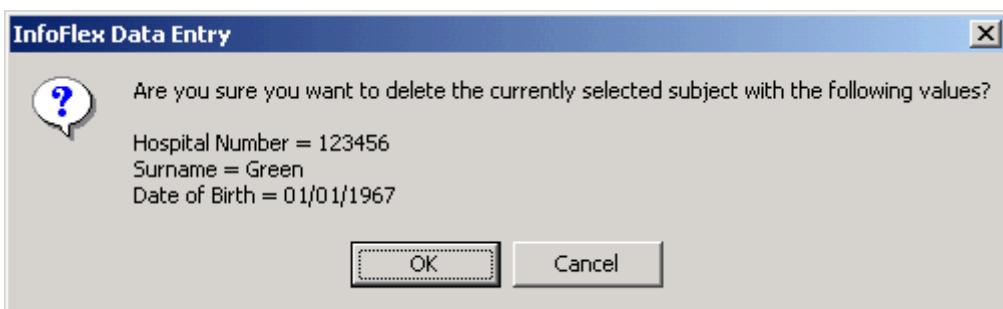


11.4 Deleting patients

Go to the **Subject** menu and choose **Delete subject**.

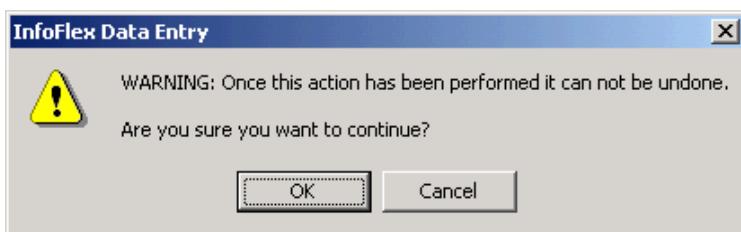


A confirmation message is displayed.



Click **OK** to continue with the deletion.

A further message warns you that the deletion cannot be undone.



Click **OK** to continue with the deletion.

12 SUMMARY VIEWS IN THE DATA ENTRY MODULE

Summary views display a grid of selected data items from repeated instances of a particular event view. Queries control which instances of the event view and which items are displayed. Summary views in the Data Entry module are generally useful where events are repeated several times for the same patient (eg Pathology Test results).

12.1 Displaying a summary view in the Data Entry module

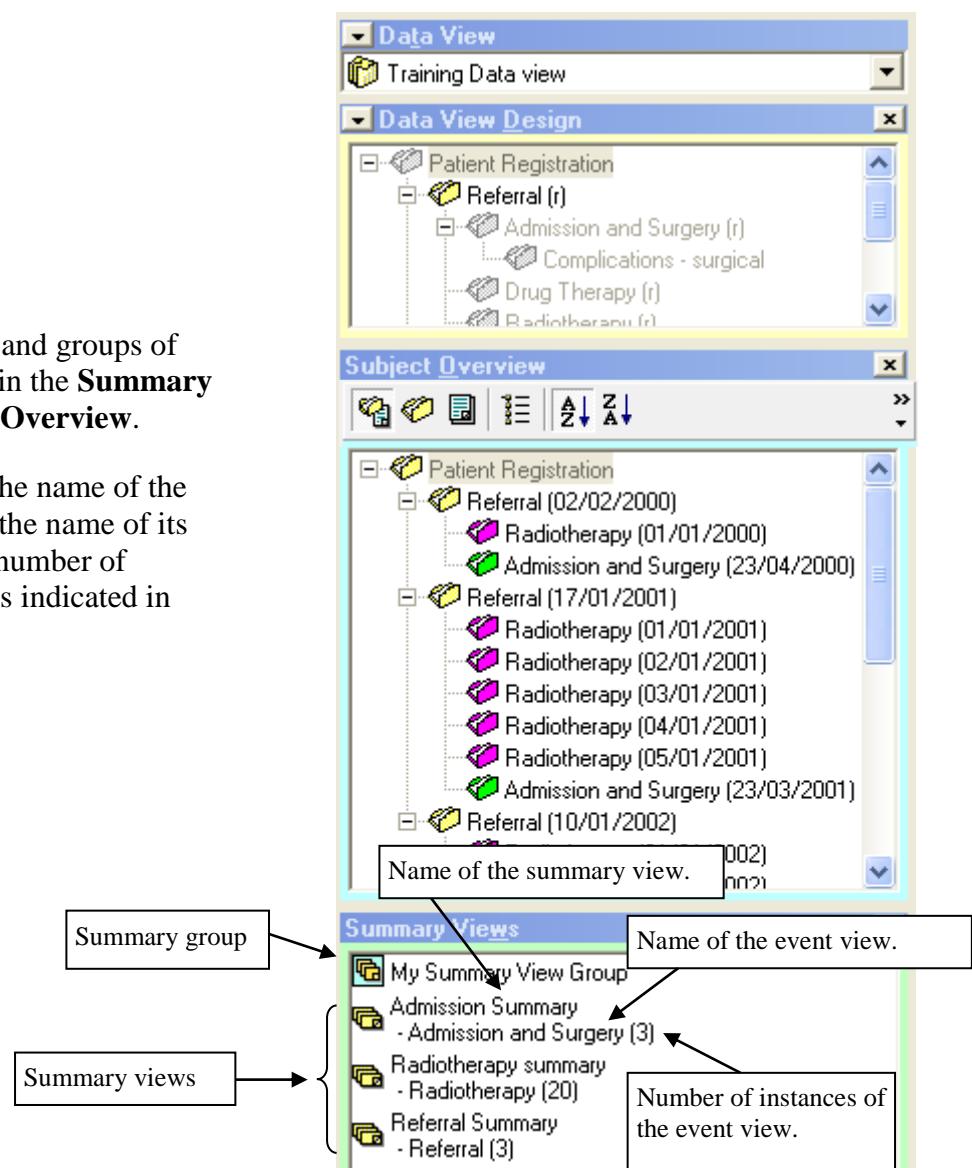
To display a summary view, first select a subject.

Ensure that Summary Views are displayed by pressing the **Show summary views** button on the toolbar.



The available summary views and groups of summary views are displayed in the **Summary Views** box below the **Subject Overview**.

In the **Summary Views** box, the name of the summary view is followed by the name of its summarised event view. The number of occurrences of an event view is indicated in brackets.

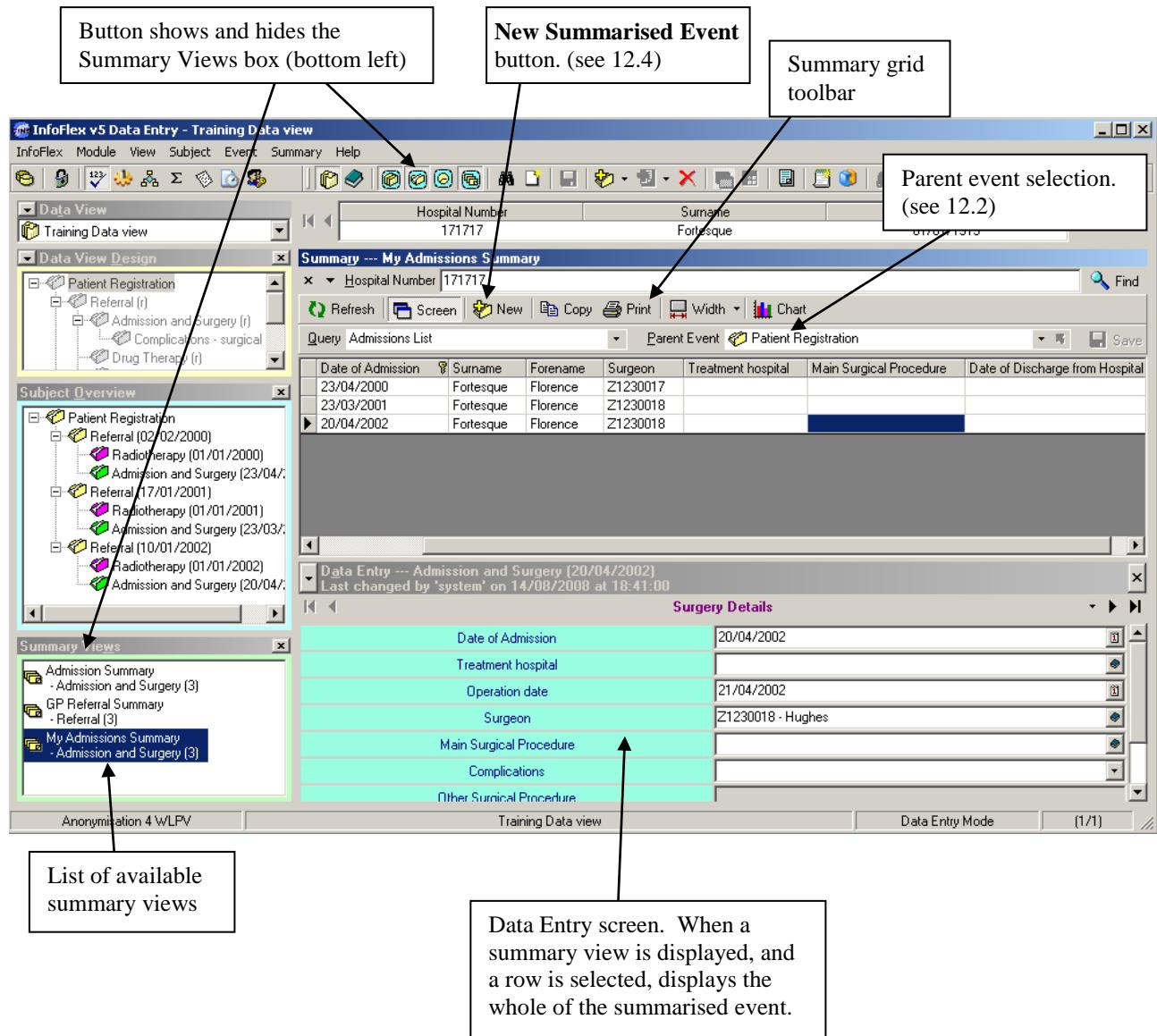


The usual data entry part of the screen is divided into the **grid** displaying the query results and the **data entry screen**. The data entry screen can be shown and hidden using the **Screen** button.

The grid displays instances of the summarised event. A query controls which data items and which instances displayed.

If you wish to view information relating to a different patient, you should carry out a search in the usual way, then re-select the summary view.

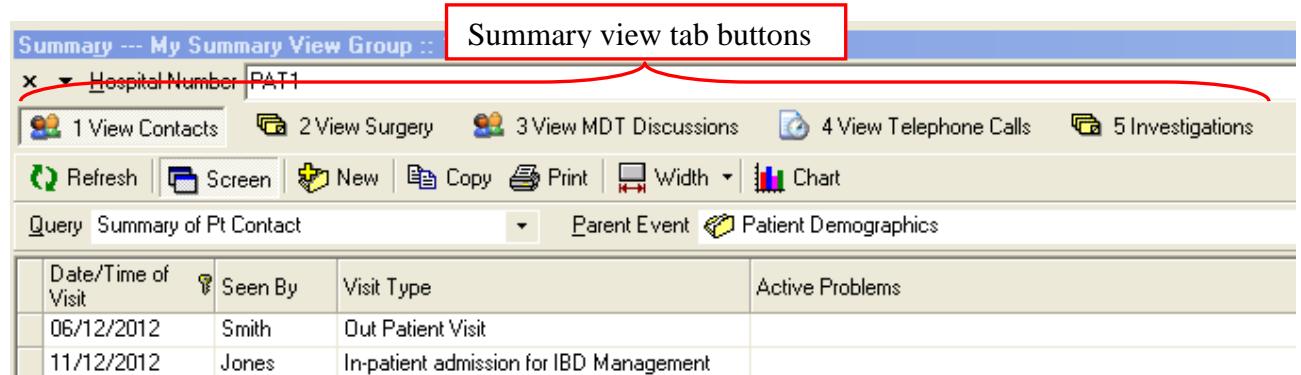
See below for the layout of summary views in the Data Entry module.



12.2 Summary view groups

A summary view group is a group of summary views. If you select a group, the views within that group are displayed on a series of tabs and you can easily switch between the views and keep the same query for each view in the group.

If you select a group, a row of tab buttons is displayed between the Subject List or Quick Find and the Work List toolbar. There is a tab button for each summary view in the group. By default, the first Summary View in the group will be displayed. Pressing a tab button will display the Summary View named on the button.



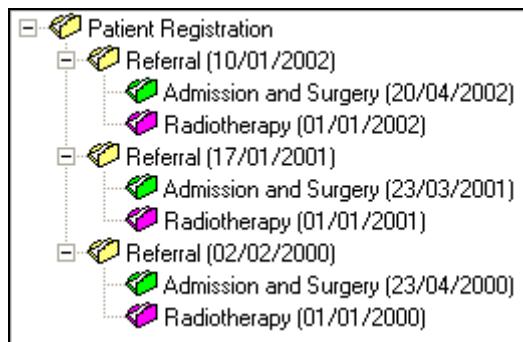
If the default queries for any of the summary views in the selected summary group contain prompt parameters then all of these will be prompted for when you select the summary view group. You will not be prompted again for the parameter values when changing summary view via the tab buttons, unless you change the query manually. However, if you refresh the grid, you will be prompted for the query parameters.

If you change the query selected in any of the Summary Views, then this selection is remembered if you leave the Summary View to go to one of the others in the group and come back again.

12.3 Parent Event

This option is only available when the summarised event has a repeat parent or repeat ancestor event. It allows you to restrict the events shown in the **Summary grid** to only those that are descended from the selected parent event.

For example, a patient has three referrals each with an Admission & Surgery event:



If the **Parent Event** is the **Patient Registration** event, then you will see all three of the Referrals and Admission & Surgery events in the **Summary grid**:

Hospital Number	Date of Admission	Surname	Forename	Surgeon	Treatment hospital	Main Surgical Procedure
171717	23/04/2000	Fortesque	Florence	Z1230017		
171717	23/03/2001	Fortesque	Florence	Z1230018		
171717	20/04/2002	Fortesque	Florence	Z1230018		

However, if you select one of the **Referral** events in the **Parent Event** you will only see the associated Admission & Surgery event in the **Summary grid**.

Hospital Number	Date of Admission	Surname	Forename	Surgeon	Treatment hospital	Main Surgical Procedure
171717	23/04/2000	Fortesque	Florence	Z1230017		

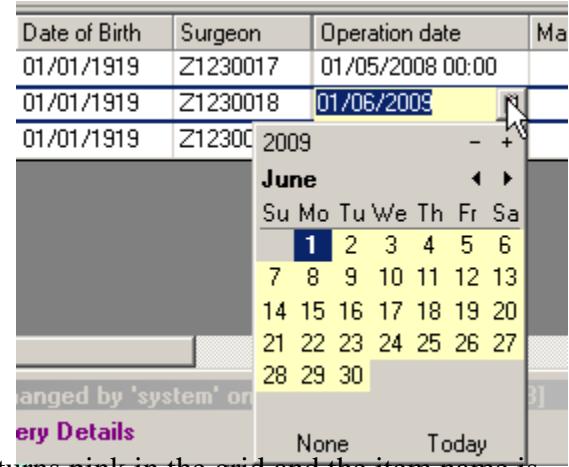
12.4 Editing Data

If permission to edit data has been given, then data items belonging to the summarised event view can be edited either in the grid or in the data entry screen.

Note that it is only possible to edit data items that belong to the summarised event view. Other data items in the summary view (eg demographic items) cannot be edited.

12.4.1 Editing data in the grid

To edit data in the grid, simply click in a cell. If you have permission to edit, the cell will display the usual data entry controls.



As you move between cells, any cell you have edited turns pink in the grid and the item name is shown in red in the data entry screen. The **Save** button is enabled to indicate that changes have been made.

If you move to edit a cell in a different row without having saved, you will be prompted to save because you are moving to a different event. However if you move from one cell to another in the same row, you will not be prompted to save because all the items are in the same event.

These items belong do not belong to the Referral event and can not

When you have finished editing, press the **Save** button, and the data entry screen will be updated with the edited data.

12.4.2 Editing data in the data entry screen

To edit data in the data entry screen, first highlight a row in the grid. This causes the data entry screen to display the whole summarised event view for the selected row.

Edit data in the same way as you would normally in the Data Entry module. Navigate through the panels as appropriate and press the **Save** button when you have finished editing.

Summary --- Admission Summary

Hospital Number	Ref Appt Date	Date of Admission	Surname	Forename	Date of Birth	Surgeon	Treatment hospital	Operation date	Main Sur Procedure
171717	02/02/2000	23/04/2000	Fortesque	Florence	01/01/1919	Z1230017		01/05/2008 00:00	
171717	17/01/2001	23/03/2001	Fortesque	Florence	01/01/1919	Z1230004	000002		
171717	10/01/2002	20/04/2002	Fortesque	Florence	01/01/1919	Z1230008		14/06/2010 00:00	

Data Entry --- Admission and Surgery (23/03/2001) [Last changed by 'system' on 14/06/2010 at 15:25:46]

Surgery Details

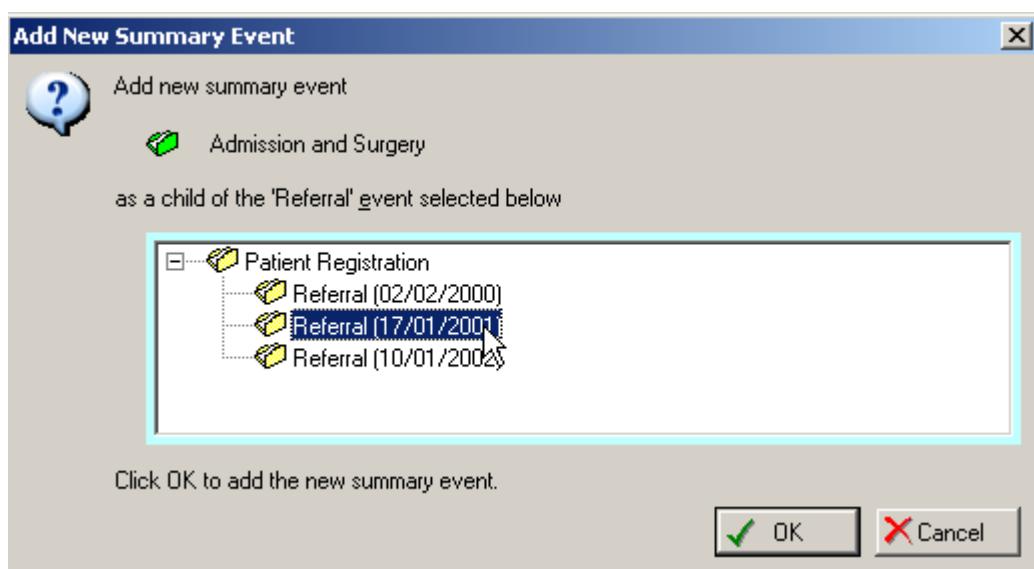
Date of Admission	23/03/2001
Treatment hospital	000002 - St Matthew's Hospital
Operation date	
Surgeon	Z1230004 - Brown
Main Surgical Procedure	
Complications	
Other Surgical Procedure	0 - No 1 - Yes
Date of Discharge from Hospital	
Follow up in:-	weeks
printdoc	

12.5 Adding a new event

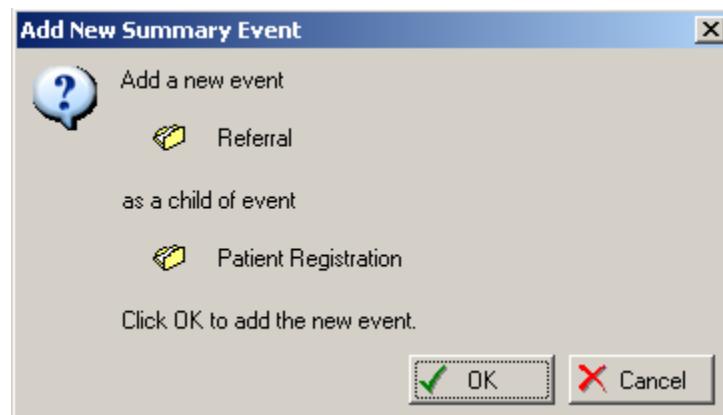
You can use the **New** button on the Summary grid toolbar to add a new instance of the summarised event.



On pressing the **New** button, the **Add New Event** window is displayed. If there are several possible parents for the event, you should choose which parent to add the new event to.



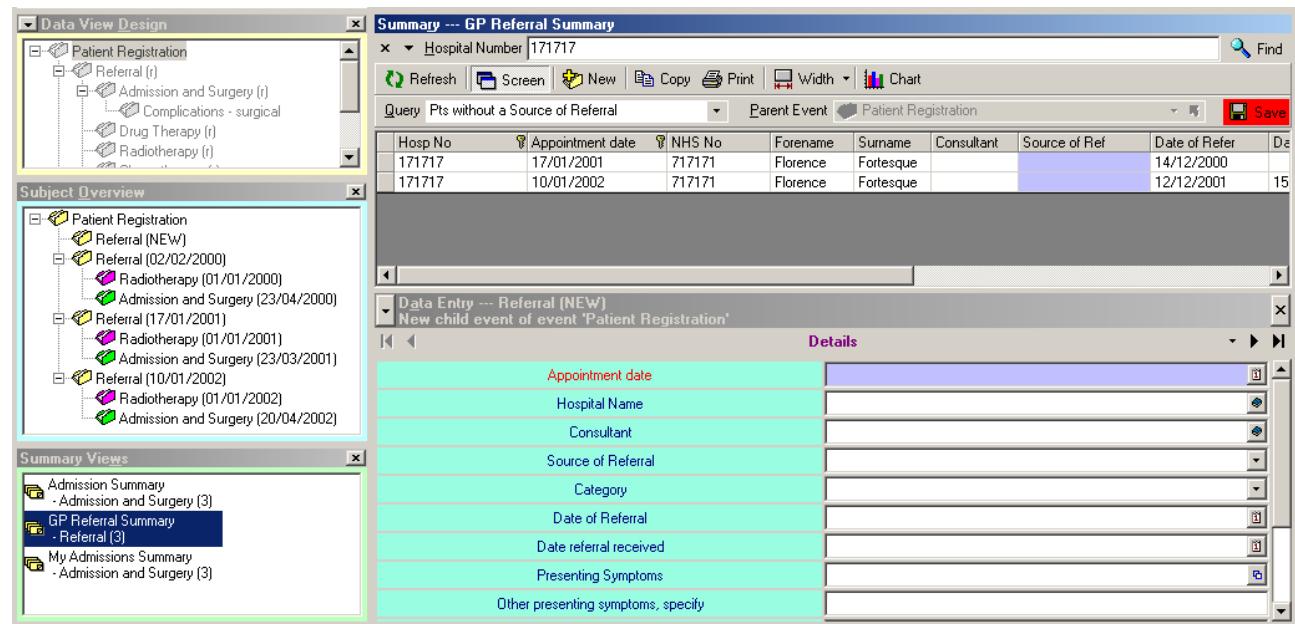
If there is only one possible parent, simply click **Yes** to the confirmation message.



The data entry section of the screen displays the new event, and the event is also displayed in the Subject Overview tree.

Enter data and save the event as usual.

On saving, the event will be displayed in the Subject Overview as usual and it will be displayed in the grid if it meets the query criteria.



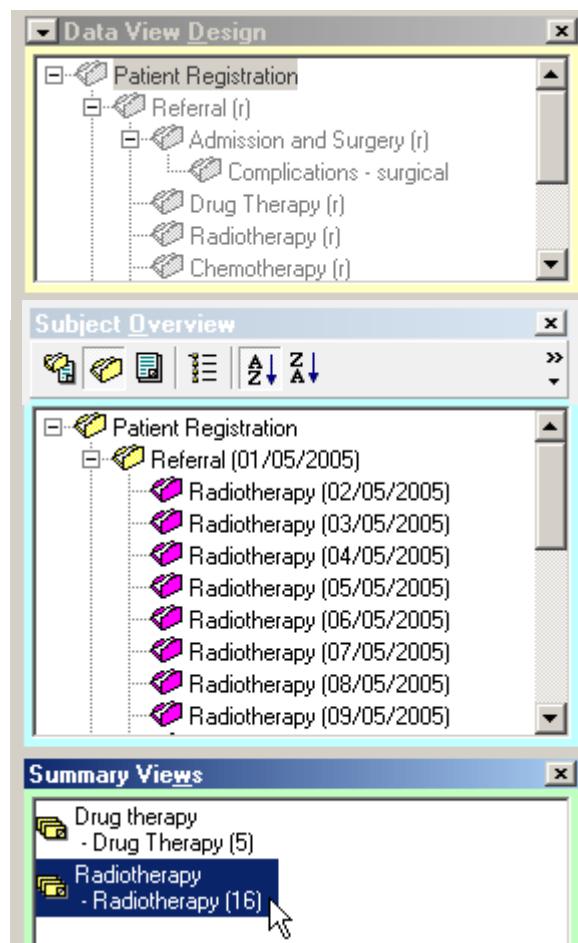
12.6 Exercise

Select the **Training** data view and find patient **123**.

Switch on Summary views by pressing the **Show summary views** button on the toolbar or go to the **View** menu and switch on **Summary Views**.



Select the **Radiotherapy** summary view.



Review the data that is displayed in the grid.

Select a row in the grid and check that the Data Entry screen for the corresponding event is displayed.

Try entering data in the grid and in the data entry screen.

Select different queries in the Query dropdown list and see how the data displayed is affected.

Select different Parent Events and see how the data displayed is affected.

APPENDIX A – ENTERING DATA

These methods of entering data apply to both Screen data entry and Grid data entry.

1 Coded items

An item with a drop-down arrow is a coded item. You may enter only one code from the list in the item.



To enter a code in the item, either:

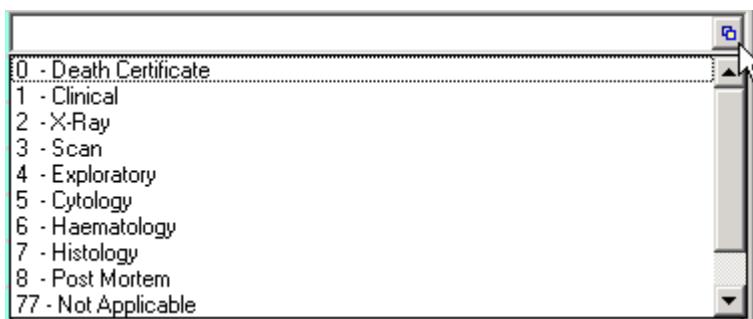
Click the dropdown arrow then use the mouse to select a code, then press return or use the mouse to move to the next item.

or:

Press F4 to pop up the list of codes, then use the up and down arrows to scroll through the list. Press return to enter the code in the coded item and move onto the next item.

2 Multiple Response coded items

An item with the squares symbol is a multiple response coded item. You may enter any number of codes from the list in the item.



To enter codes in the item, either

Click the squares symbol then use the mouse to select the codes. When you have selected all the codes you need, press return to enter the codes in the item. Then press return or use the mouse to move to the next item.

or:

Press F4 to pop up the list of codes, then use the up and down arrows to scroll through the list. Press space bar to select or deselect a code. When you have selected all the codes you need, press return to enter the codes in the item. Then press return or use the mouse to move to the next item.

3 Date items

An item with a calendar symbol is a date item.



To enter a date either:

Type the date directly into the date item using the keyboard. As you start typing, InfoFlex will add today's month and year. Simply type over the month and year if they are not correct. You do not need to type the slashes. Press return to move to the next item when you have entered the date.

or

Press t to enter today's date then use the following shortcut keys:

d	Add day	shift + d	Remove day
w	Add week	shift + w	Remove week
m	Add month	shift + m	Remove month
y	Add year	shift + y	Remove year
h	Add hour	shift + h	Remove hour
n	Add minute	shift + n	Remove minute
s	Add second	shift + s	Remove second

Press return to move to the next item.

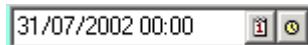
or

Click the calendar symbol or press F4 to pop up the date picker. Use the left and right arrows to scroll through months, and use the + and - signs to scroll through years. Click the date you wish to enter. As soon as you click a date on the calendar, it will be entered in the item. Press return to move to the next item.



4 Date / time items

An item with a calendar and a clock symbol is a date/time field.



To enter the current date and time, press the 't' shortcut key.

To enter the current date with a 00.00 time, press the 'T' shortcut key.

To enter your own date/time, type directly into the field. Note that as you type, the time defaults to 00.00 until you type something different over it.

To update the time, either type straight over it (you do not need to type the colon)

or

use the following shortcut keys in addition to those listed above for dates:

h	Add hour	shift + h	Remove hour
n	Add minute	shift + n	Remove minute
s	Add second	shift + s	Remove second

Press return to move to the next item.

or

Click the clock symbol or press shift + F4 to pop up the time picker. Use the plus and minus buttons to scroll through months hours and minutes, or use the drop down arrow to pick from the list. When you have selected the correct time, press the green tick button which displays the time you have selected. Press return to move to the next item.



Note: the **24 hour clock** must be used whenever entering data in a date/time field or a time field.

5 Value items

An item with plus and minus symbols is a value item. The format the value must take is indicated by # signs. The units of the value (if any) will be shown after the hash symbols.



To enter data in a value item, either:

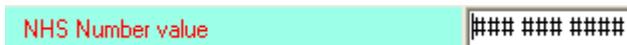
Type directly over the hash symbols using the numbers on the keyboard.

or:

Click the plus and minus signs with the mouse to scroll to the number you wish to enter.

NHS numbers

Text items can be configured to allow entry of the NHS number in the 3 3 4 format. When the user types in the field in Data Entry, only digits are allowed, and they will be automatically formatted in the 3 3 4 format. The user can type spaces or not type spaces as they wish.



In addition, changes have been made so that InfoFlex recognises that this mask is a non-numerical format, so the '+' and '-' buttons will not be displayed on the item.

6 Restrictions and validations

It is possible to set up restriction or validation criteria to check that the data you enter meets certain rules. Messages are displayed if the data you enter does not meet the criteria.

There are several types of restrictions and validations (see below). When a validation or restriction is not met, a prompt message is displayed – usually when exiting the item the rule has been defined against. (Messages arising from Item Validations can be defined to display either on exiting the item or on saving the event).

All types of restriction and validation will either be warning or mandatory.

Warning messages

 A yellow triangle on a prompt message indicates a warning message – data you have entered does not meet the specified restriction or validation but you can save this data.

Mandatory messages

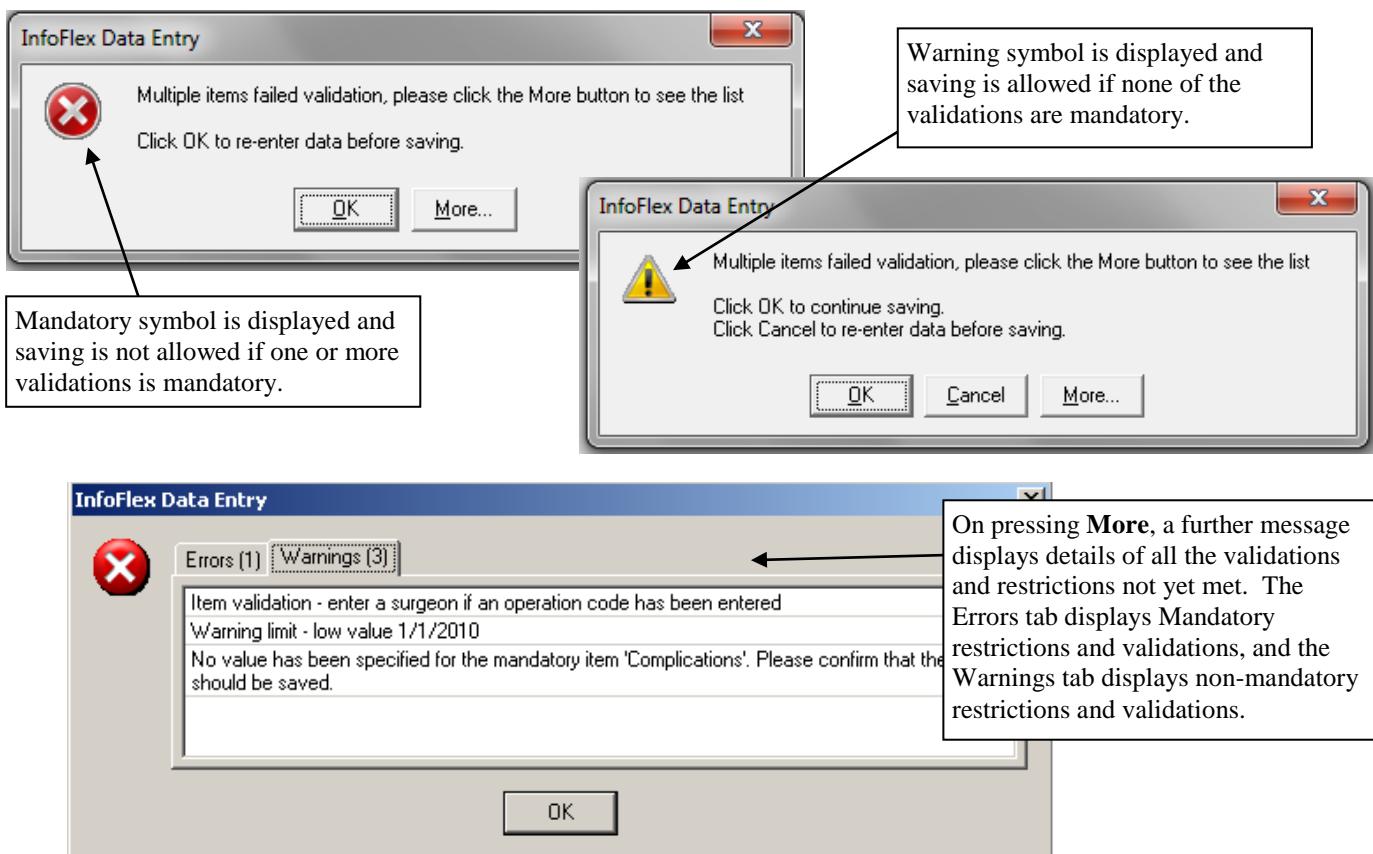
 A white cross in a red circle on a prompt message indicates a mandatory message – data you have entered does not meet the specified restriction or validation and you cannot continue and save the event with this data. You must re-enter the data in order to continue.

Messages displayed on saving

On saving the event, if there are still items whose restrictions or validations have not been met, a message is displayed. If there is only one item affected, the message displays details of that single validation that has not been met.



If multiple items are affected a general message is displayed and a **More** button allows you to view the details of all the validations that have not been met.



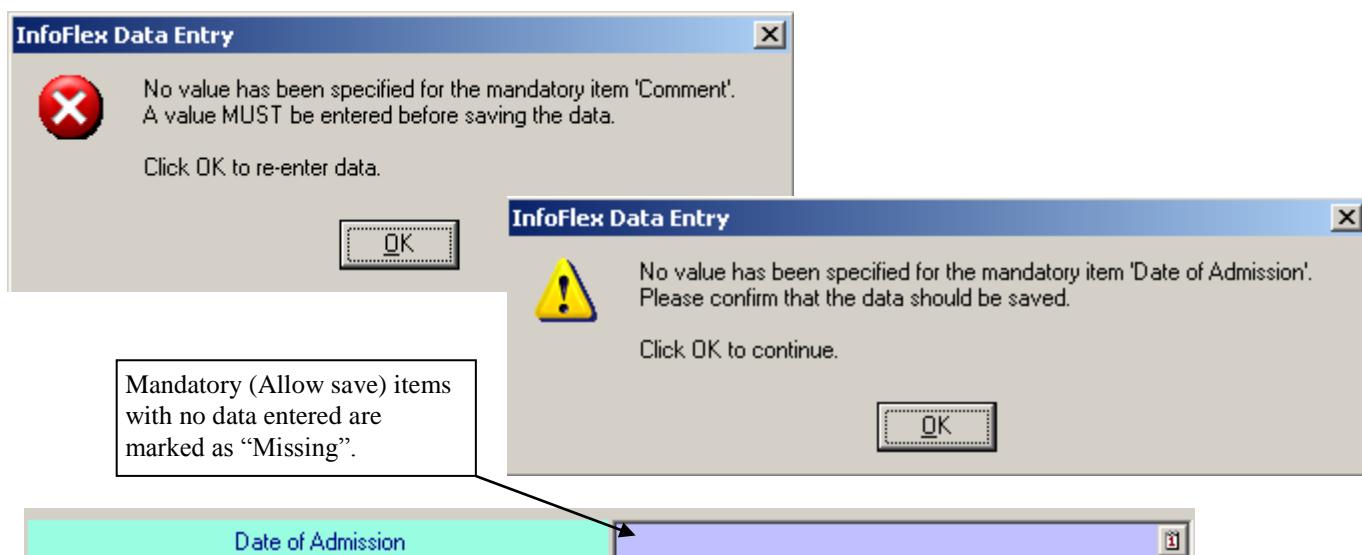
Types of restriction

Mandatory items

An item can be set to Mandatory or Mandatory (Allow save).

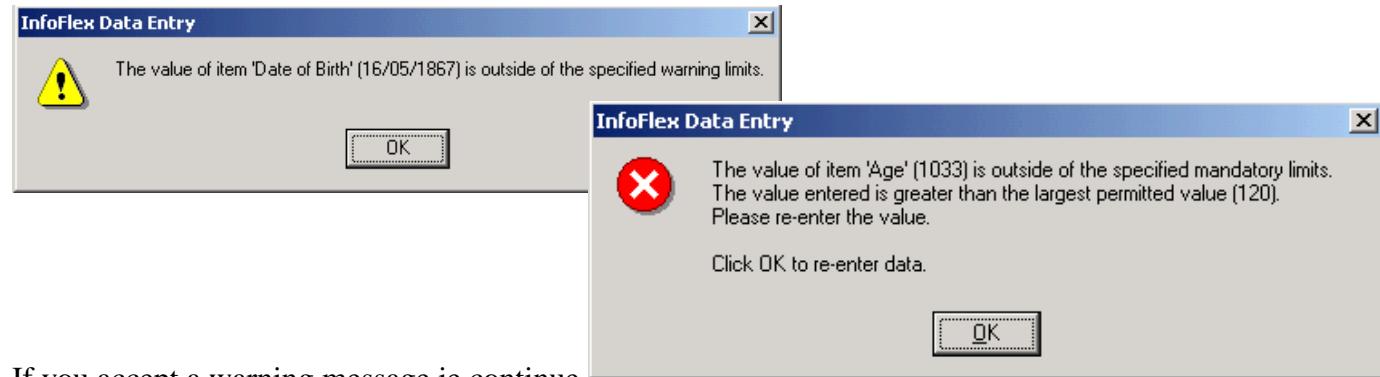
Mandatory items must have data entered in them. Saving will not be allowed until data is entered.

Mandatory (Allow save) items will display a warning message if no data is entered, but saving will be allowed if no data is entered. The item will be marked as Missing (blue background).



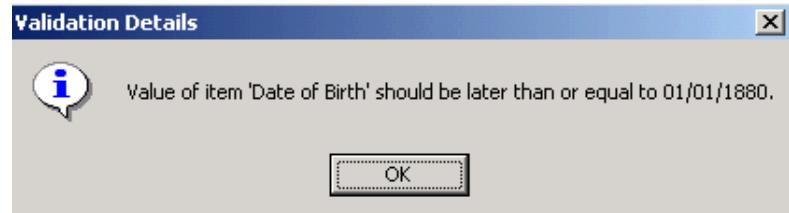
Warning and Mandatory limits on date and value items

Lower and/or upper limits can be set on date and value items to warn that the date or value is outside a specified range. The limits can be either warning or mandatory.



If you accept a warning message ie continue to save without correcting the data, the item will be marked with a red background in data entry.

To look up the limits that have been set for an item, press Shift + F1.



Event identifier date restrictions

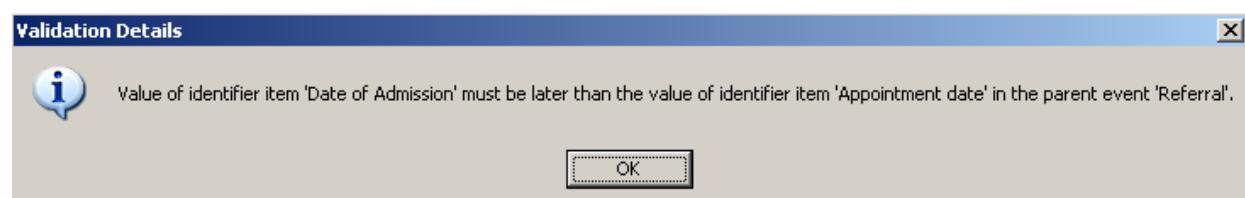
Restrictions can be set on event identifiers to force the identifier to be later than a parent event identifier. This restriction is always mandatory. You will not be allowed to continue entering data until the restriction is met.



If an Event identifier is invalid due to this restriction, the item will be marked with a red background in data entry.

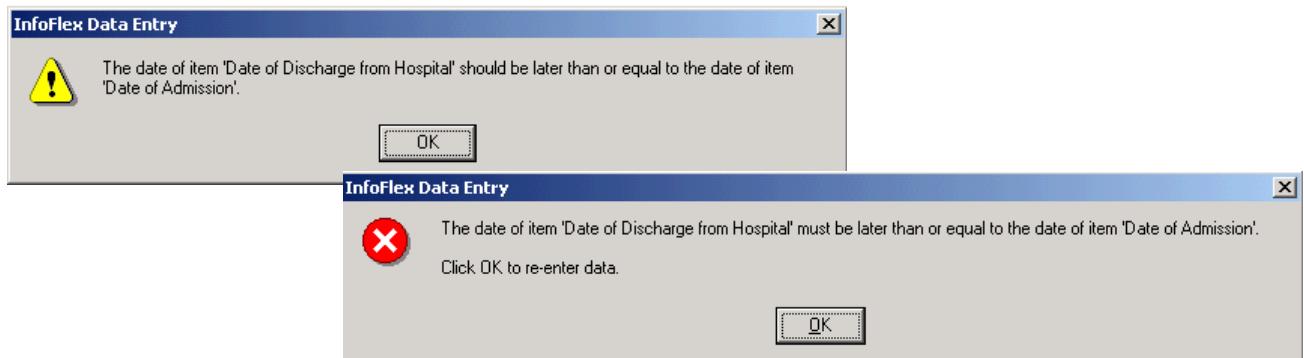


To look up the event identifier restriction that has been set for an event, press Shift + F1 in the identifier item.



Date restrictions

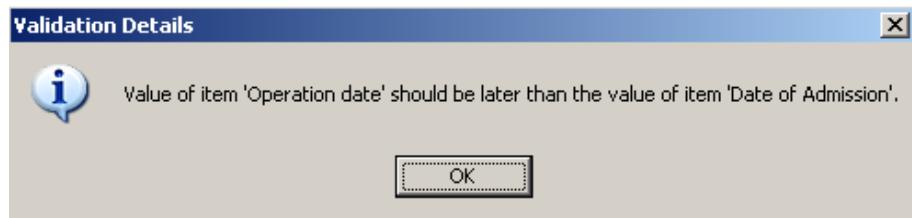
Restrictions can be set on any date item to force the date to be earlier, later than or equal to a date in the same or a parent event. The restrictions can be mandatory or warning



If a date item is invalid due to this restriction, the item will be marked with a red background in data entry.



To look up the event identifier restriction that has been set for an event, press Shift + F1 in the identifier item.

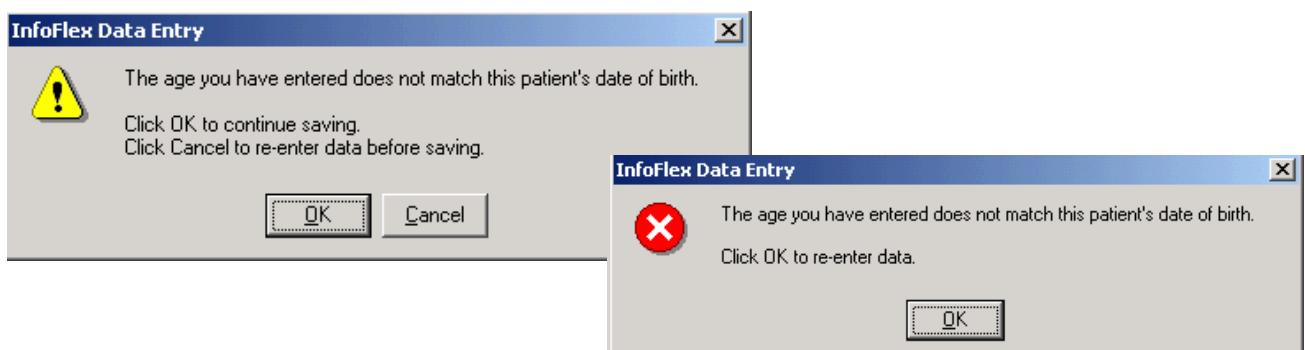


Item validations

Item validations can be defined on any item type and can use any mathematical formula or comparison and can relate to any other item in the same or a parent event. The person who set the restriction up will have entered their own message describing why the restriction has not been met.

The check to see if the item meets the validation criteria can be carried out either on leaving an item, or on saving the event.

The validation can be either warning or mandatory.



7 Text items

A text item has no symbol in data entry. Text items can contain any free text.

A text item can appear as a single line:

or as a double line.

The maximum number of characters a text item can contain is 255 although it is possible to restrict this to a smaller number of characters.

To enter data in a text item, simply type in the item. You can also paste text from the clipboard using **ctrl + v**.

It is possible to enter a carriage return in double line text items. By default, the keyboard shortcut **Ctrl + Enter** will enter a carriage return. However, it is possible for double line text items to be defined so that simply pressing **Enter** will enter a carriage return. In this case, **Ctrl + Enter** moves the cursor to the next field. Your system administrator will be able to tell you how the field has been defined.

To select all the text in a text item, press **Ctrl+Q**.

To position the cursor at the end of the text press **Ctrl+Shift+Q**.

Normally when you select an item, the whole of the text entered in that item is highlighted. It is possible to change this behaviour so that when you select a text item, the cursor instead goes to the end of the text. Contact your system administrator if you wish to change this behaviour.

NHS numbers

Text items can be configured to allow entry of the NHS number in the 3 3 4 format. When the user types in the field in Data Entry, InfoFlex does not allow any characters other than numbers. It automatically formats the digits with the spaces in the correct place. The user can type the spaces or not type the spaces as desired.

Note that the user should always type in any required leading zeros.

NHS Number	123 456 7890
------------	--------------

8 Memo items

A memo item has no symbol in data entry and is displayed with double depth.



Memo items can contain any free text and are used when a large volume of text needs to be entered. Memo items can store 2Gb of data in SQLServer databases and 1Gb of data in Access databases.

To enter data in a memo item, simply type in the item. You can also paste text from the clipboard using **ctrl + v**.

It is possible to enter a carriage return in memo items. By default, the keyboard shortcut **Ctrl + Enter** will enter a carriage return. However, it is possible for memo items to be defined so that simply pressing Enter will enter a carriage return. In this case, **Ctrl + Enter** moves the cursor to the next field. Your system administrator will be able to tell you how the field has been defined.

Normally when you select an item, the whole of the text entered in that item is highlighted. It is possible to change this behaviour so that when you select a memo item, the cursor instead goes to the end of the text. Contact your system administrator if you wish to change this behaviour.

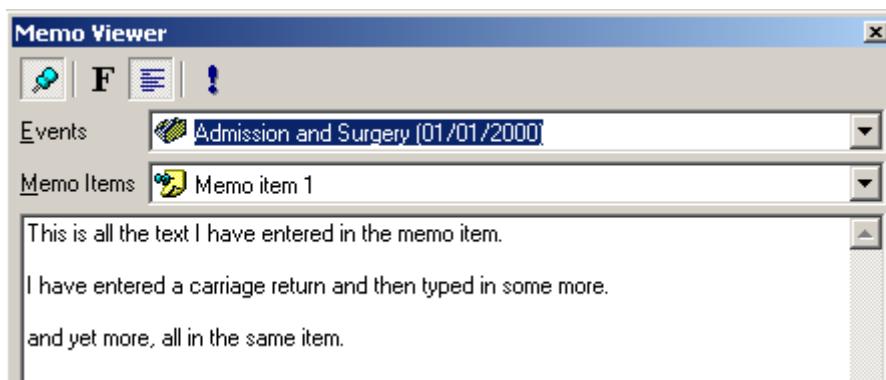
To select all the text in a memo item, press **Ctrl+Q**.

To position the cursor at the end of the text press **Ctrl+Shift+Q**.

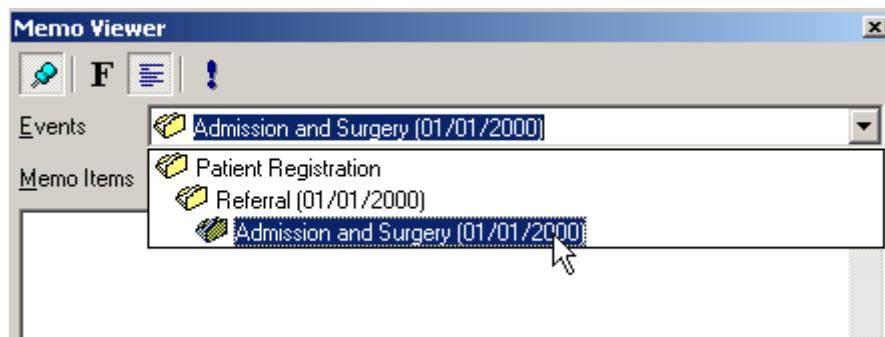
Memo viewer

The memo viewer can be used to view the text that has been entered in memo items. To display the memo viewer, go to the **Event** menu and choose **Memo Viewer**.

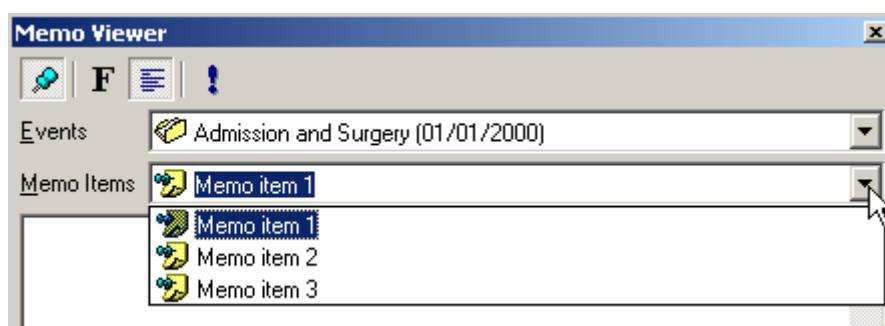
If the cursor is already positioned in an item when you choose the Memo Viewer, it automatically displays the contents of that item.



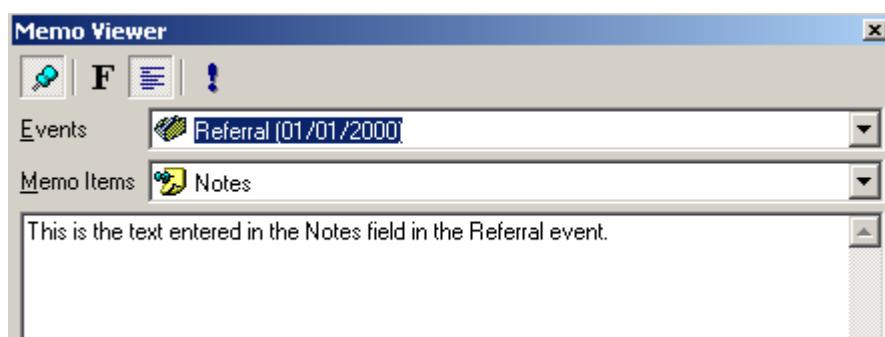
In the **Events** list, you can choose a different event to view memo items for. (The list displays the current event and its parents).



After choosing an event, the **Memo Items** list displays all the memo items in the selected event.



After selecting an item, the viewer displays all the text that has been entered in the item and saved.



The pin button  keeps the viewer open while you select events and items in Data Entry.

The **F** button  allows you to adjust the font that is used in the viewer.

The **Wrap** button  wraps the text within the viewer.

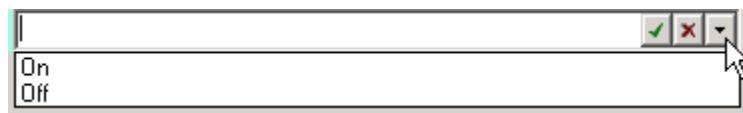
The exclamation mark button  refreshes the text. Only saved data is displayed in the viewer.

9 Boolean items

A Boolean item displays a pair of options represented by a tick and a cross. The actual text can vary. It can be yes/no, true/false, on/off or any other text that has been defined in Design Management.



You can either use the dropdown list to display the values to choose from:



or you can use the tick and cross buttons.

The tick would enter True, Yes, or On.

The cross would enter False, No or Off.

Boolean items can also be represented by a check box style of Data Entry. For example:



When using the Check Box style, the value of the boolean item check box can be changed by clicking in the box, or by pressing the space or F4 keys when the check box has focus. The check box will display nothing when the boolean item value is blank, a tick when the boolean item value is true, and a cross when the boolean item value is false.

meaning false, meaning true, meaning blank.

The tick or cross can be removed by pressing the delete key.

If the value of the Boolean item is missing or unknown then no tick or cross will be displayed and the background colour of the checkbox will be set to the appropriate marker colour.



10 Dictionary Lookup items

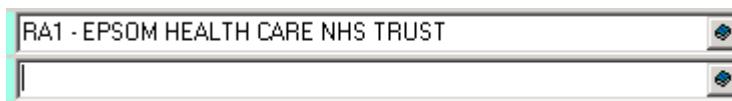
An item with a dictionary symbol is a dictionary item. A dictionary is a look up table. It can be used just to look up a meaning, or to bring back additional items of data relating to that code (eg a GP code could be used to look up a GP name and address).

To enter data in a dictionary item, either

Type in the code, if you know it, then press return



– InfoFlex will put in the meaning, populate any linked items and move to the next item as you press return.



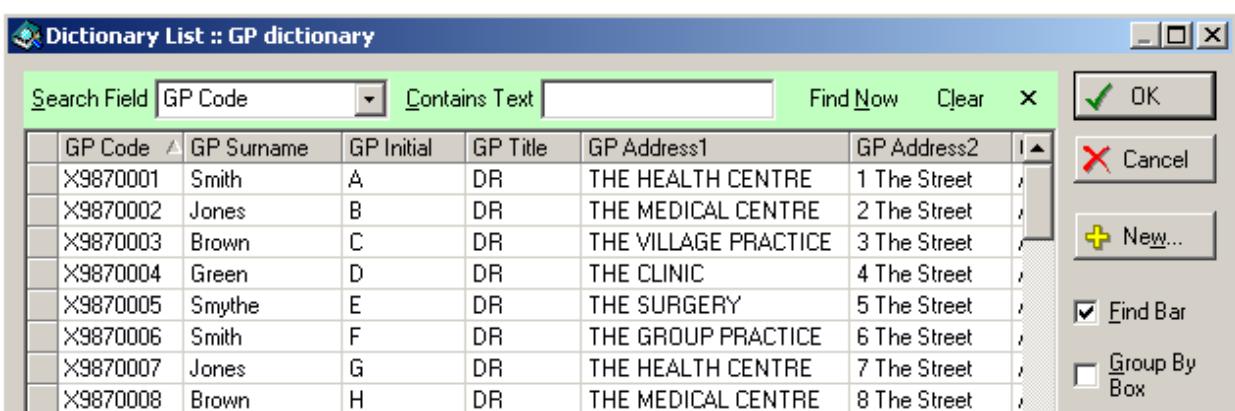
or

Click the dictionary symbol or press F4 to bring up the dictionary list.



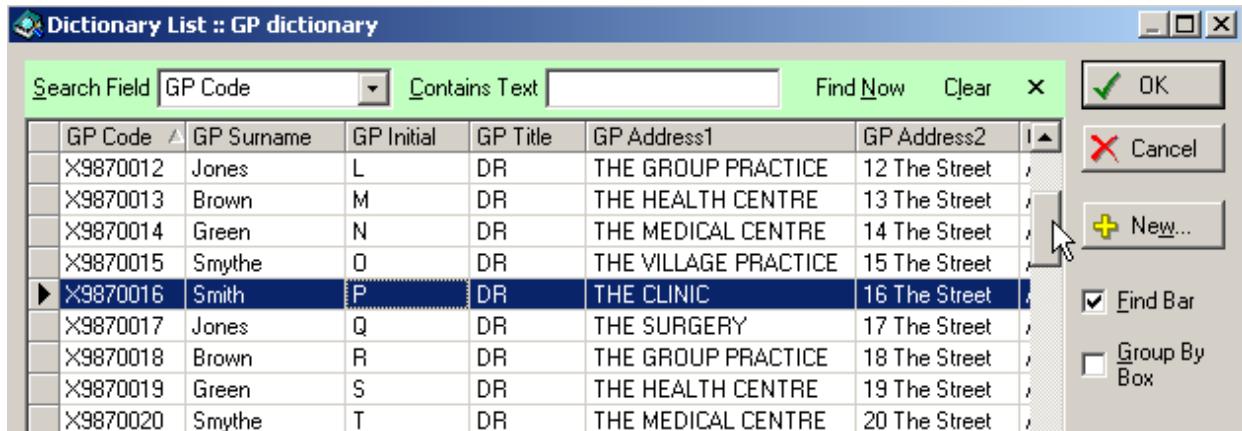
Using the dictionary list

When you press F4 or the dictionary symbol, a Dictionary List window opens. It contains a list of all the codes in the dictionary.



To select a code to enter in the item, either:

Scroll through the list using the mouse or (after first selecting a row) the PgUp / PgDn / Up arrow / Down arrow keys. Highlight the code you wish to use then press return, or double click to enter it in the item and populate any linked items.

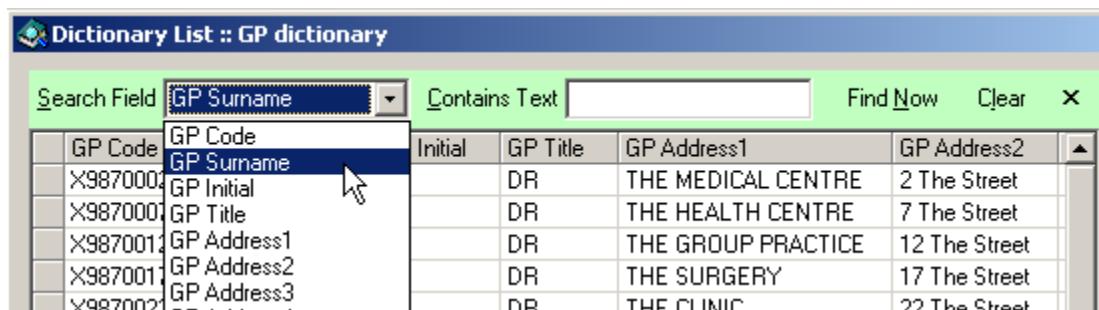


or:

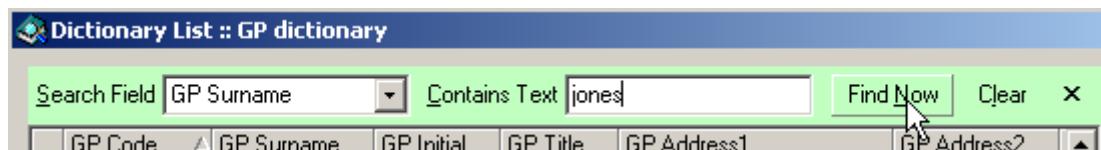
Ensure the **Find Bar** is displayed



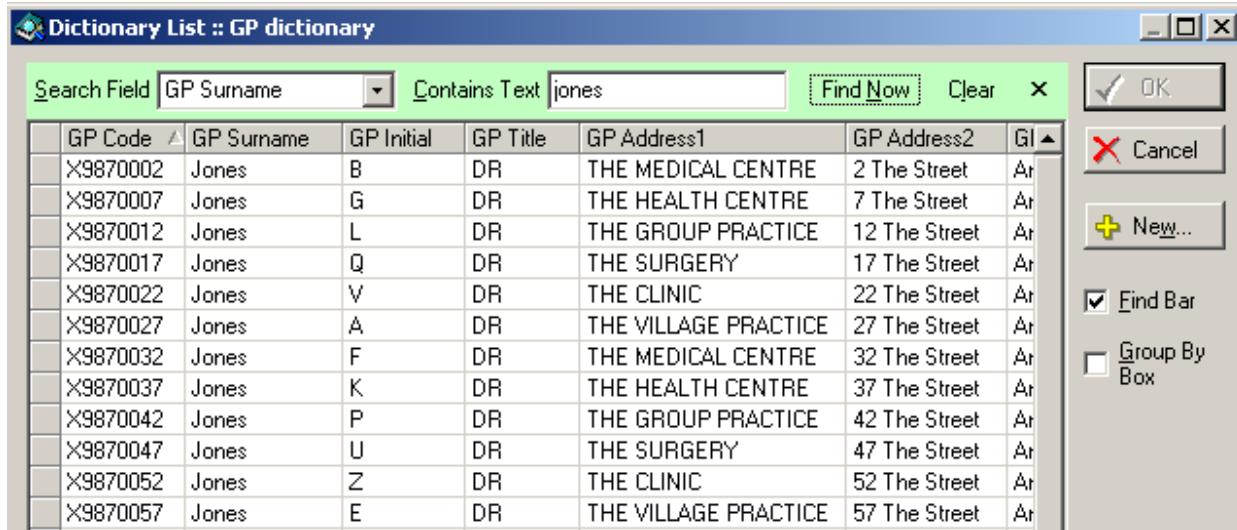
In the **Search Field**, choose a field that you would like to search by.



In the **Contains Text** field, type the text that you wish to search for then press **Find Now**. Note that you can type in just part of a name and the search will return all those records which contain the search text somewhere within the field you have selected.



When you press **Find Now**, the results of the search are displayed in the **Dictionary List** window.



Scroll through the list of results using the mouse or (after first selecting a row) the PgUp / PgDn / Up arrow / Down arrow keys. Highlight the code you wish to use then press return, or double click to enter it in the item and populate any linked items.

Press **Clear** if you wish to return to the complete list of codes in the dictionary.

Press **X** to close the **Find Bar**. The find bar can also be closed, and opened, via the **Find Bar** check box on the Dictionary List dialog.

If the **Find Bar** is open when the **Dictionary List** dialog is closed then it will be open again the next time the dialog is opened for the same dictionary. The currently selected search field and search criteria will also be the same the next time the dialog is opened for the same dictionary. Note that these are retained on a per dictionary basis, even if the dialog is opened from a different dictionary lookup item.

The type of search performed will be dependent on the type of the dictionary data item selected as the search field, as follows:

Text and Memo Items

Searches for all dictionary entries where the selected dictionary item contains the text specified in the search criteria field. Boolean searches can be performed by entering multiple words in this field. For example, **john smith** will search for all entries that match both 'john' and 'smith'. Phrases can be searched for by containing the search phrase in double quotes, e.g. **"john smith"** will search for all entries that contain 'john smith'. **Note that the searching is not case sensitive and does not perform whole word searches.**

Multi-select Coded Items

Searches for all dictionary entries where the selected dictionary item contains all of the codes selected in the search criteria field. (Note that the search criteria field will be labelled **Contains Codes** for multi-select coded items.)

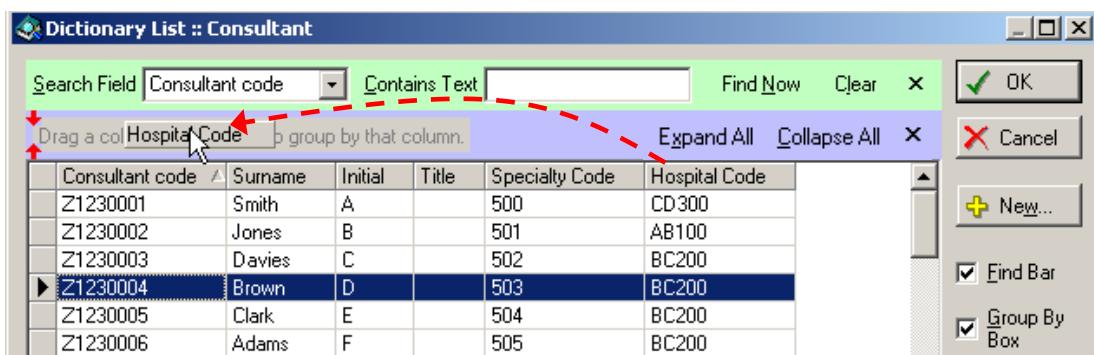
Others

Includes single-select coded items, date items, value items and boolean items. Searches for all dictionary entries where the selected dictionary item matches the value specified in the search criteria field. (Note that the search criteria field will be labelled **Matches Code** for single-select coded items, **Matches Date** for date items, and **Matches Value** for value and boolean items.)

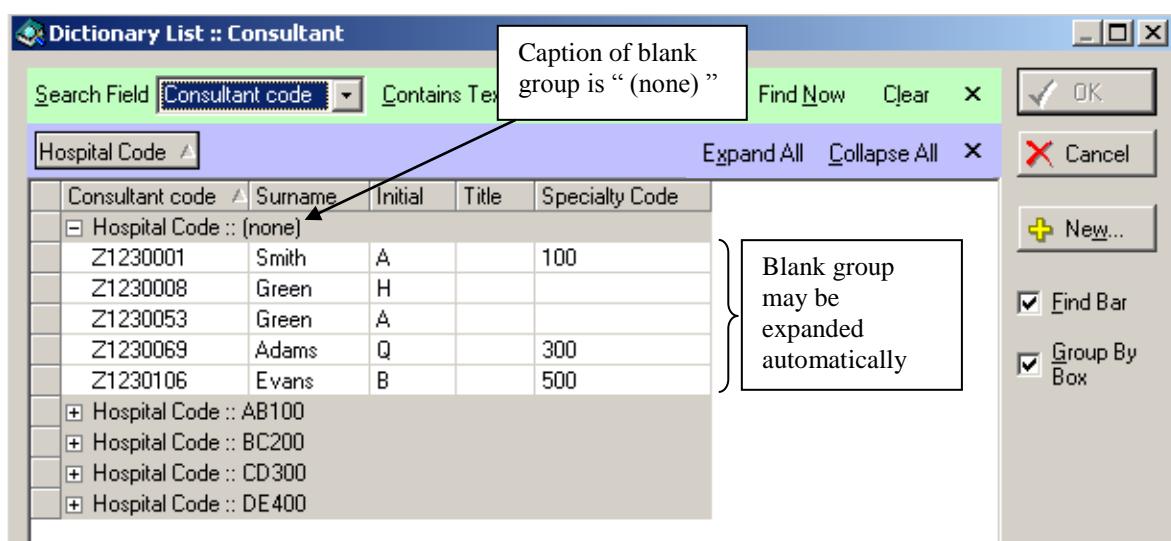
Group by

You can choose to group the dictionary list by one of the items eg you could group the Consultant dictionary by specialty. Dictionaries can be defined so that they are already grouped, to allow you to apply groups yourself, or not to allow grouping.

To group by an item, ensure the **Group By Box** check box is ticked then drag a column heading into the Group by area. Note that the Group by function is only available if it has been enabled in Design Management.



Note that where dictionary entries have no value entered in the item being grouped by, then a group called **(None)** is displayed. Depending on how the dictionary has been defined, this group may be expanded by default when grouping is applied.



Sorting

Dictionary records can be ordered ascending or descending by clicking on a column heading. Click a column once to order it in ascending order and click a second time to order it in descending order. An up or down arrow indicates that a column has been ordered ascending or descending respectively.

Dictionary List :: Hospital	
<input type="text" value="Search Field Address 1"/> <input type="button" value="Contains Text"/>	
Code	Hospital
RA0	CROYDON COMMUNITY NHS TRUST
RA1	EPSOM HEALTH CARE NHS TRUST

Conditional dictionaries

Sometimes the available records in a dictionary will already have been filtered when you display the dictionary. The records can be filtered using a query defined in Design Management. Sometimes the filtering is dependent on values entered elsewhere in the current patient's record eg the values available in the ICD10 dictionary may be filtered depending on the specialty entered for that patient.

You should be aware that the value entered in any item that contributes to the dictionary filter can affect the available records in the dictionary.

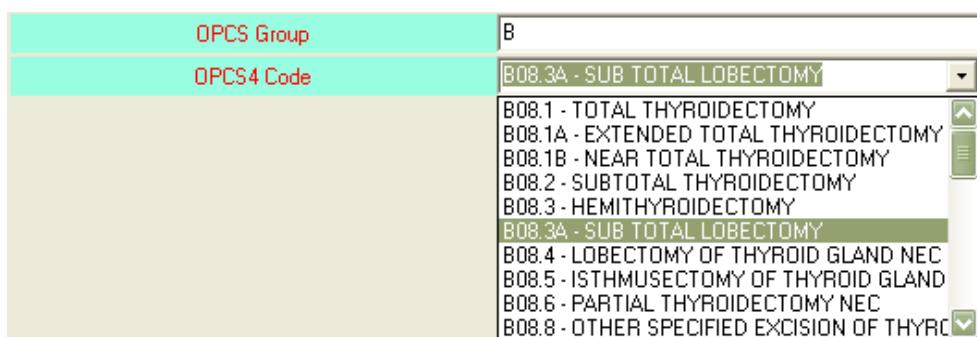
You should also be aware that if you enter a value in a dictionary item and then subsequently change the value entered in an item that contributes to the dictionary filter, a warning message may be displayed because the value in the dictionary is no longer valid.

Dictionaries displayed as dropdown lists

Dictionary items can also be displayed as dropdown lists. It is still possible to display the dictionary list dialog for the dictionary lookup item via the **Shift+F4** key combination (the **F4** key will display the drop down list). The drop down list can make data entry more efficient if there are not many relevant dictionary entries to choose from.

The drop down list for the dictionary lookup item will only display the specified code and meaning item values. To see the values of the linked items in the dictionary you will need to open the dictionary list dialog.

This screenshot shows an OPCS dictionary displayed as a drop down list, filtered so that it only displays those entries whose code starts with the same letter as defined in the 'OPCS Group' item field:



Adding new data to dictionaries

Press **New** if you wish to add a new code to the dictionary.
 (Note that some users may not be granted permission to add data to dictionaries).



A data entry window containing all the items for the dictionary opens.

Details	
GP Code	<input type="text"/>
GP Surname	<input type="text"/>
GP Initial	<input type="text"/>
GP Title	<input type="text"/>
GP Address1	<input type="text"/>
GP Address2	<input type="text"/>
GP Address3	<input type="text"/>
GP Address4	<input type="text"/>
GP Postcode	<input type="text"/>
GP Telephone number	<input type="text"/>

Save Cancel

Enter data in all of the items, then press **F5** or the **Save** button.

The new entry is included in the Dictionary List and can be selected for use in the dictionary item as described above.

Note: when adding data in a dictionary, you should not use a dash with a space either side in the code item. The dash with space either side is used as the delimiter between code and meaning, so if you put a dash in the code item, the text after the dash will be lost and there is a risk of the wrong code being entered in the data item. You can use a dash in the code text so long as there are other characters before and after it. A warning is displayed if you enter a dash with a space either side in the dictionary code item.

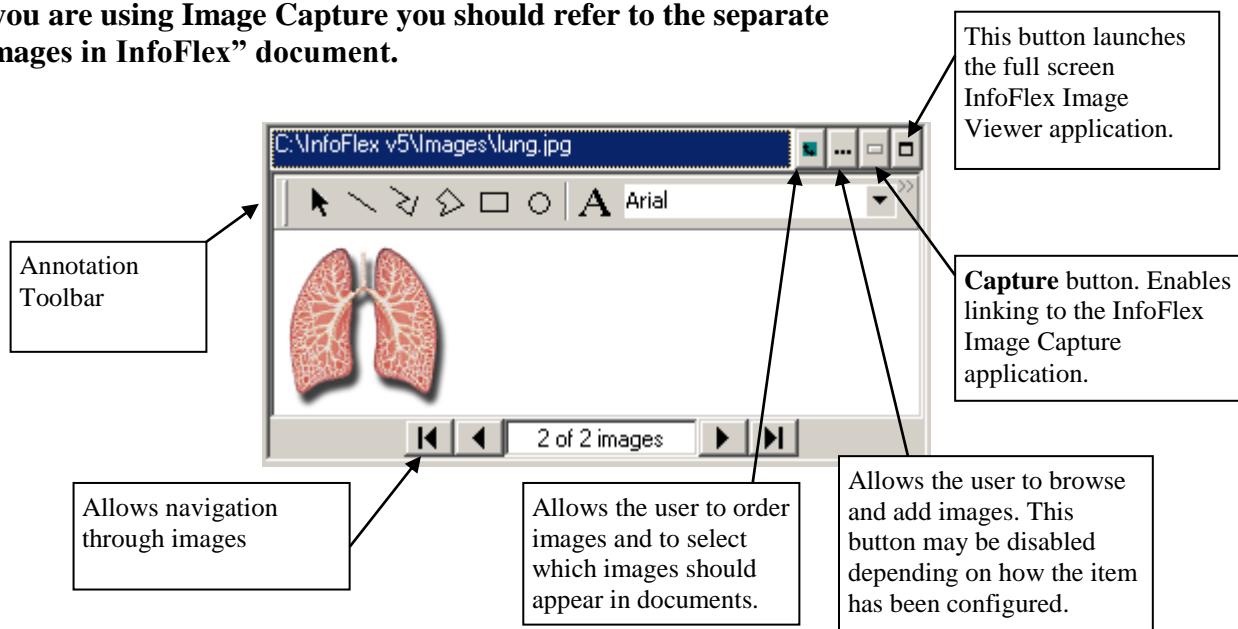
11 Media Items

Media items can contain image, audio or video files. The item is configured to store one type of media only. Items that are configured to store images behave slightly differently from items that are configured to store audio or video files.

11.1 Image items

Image items allow you attach, view and annotate images or to view and annotate a default image. The user can browse for images, or use image capture to add new images, depending on how the item has been configured.

If you are using Image Capture you should refer to the separate “Images in InfoFlex” document.



When browsing for images, files with extensions **.bmp**, **.jpg** and **.wmf** are searched for. Images saved as progressive jpgs cannot be used. More than one image can be saved in a media item if the **Multiple Select?** property has been set.

Once the event is saved, the images are stored in the specified folder. The images can be annotated in the Data Entry Screen or Grid or in the **Image Viewer** application (see below), and can be deleted from there. The images can be re-ordered and selected for printing using the **Order Images** dialog (see below).

Any change to the media item, including selecting which image is currently visible, will cause the **Save** button for the event to be enabled indicating that a save is required.

Attaching images

Press the **Browse** button  to navigate and select an image to attach. More than one image can be saved in a media item if the **Multiple Select?** property has been set.

Default images

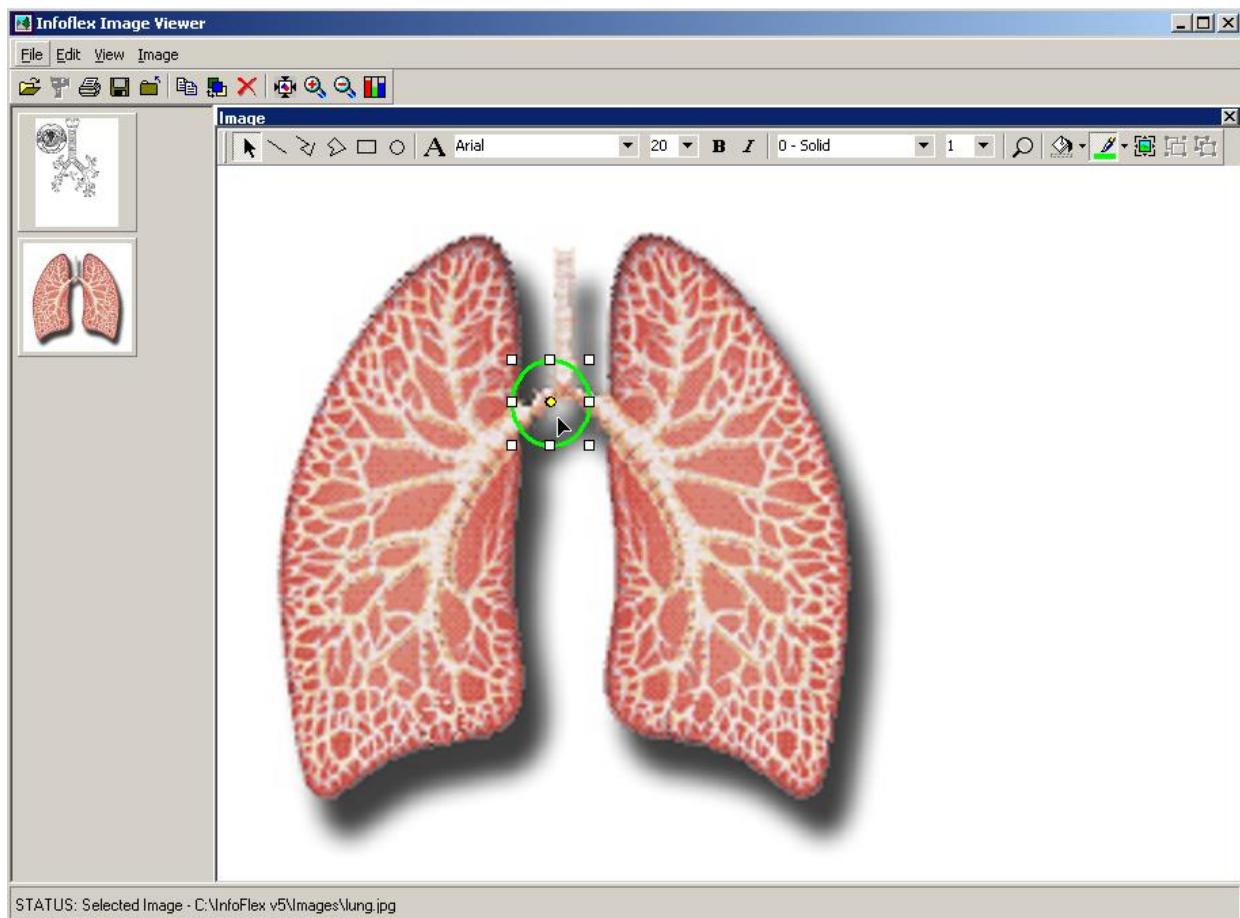
It is possible that a default image has been defined. In this case the same image will be displayed in the media item for all patients. Any annotations are specific to the individual patient. The **Browse** button may be disabled to prevent further images being added.

InfoFlex Image Viewer application

Press the  button to open the Image Viewer application. This application shows the image in full size and allows the annotation of images, as well as the adding, deleting and copying of images.

The menu bar allows the user to use different drawing tools such as text, lines, circles and to choose styles, colours etc. Annotations can be removed by selecting them individually and pressing the **Delete** button.

The annotations are stored with the image and superimposed on top of the image.



Changes made in the Image Viewer application should be saved before closing the window.

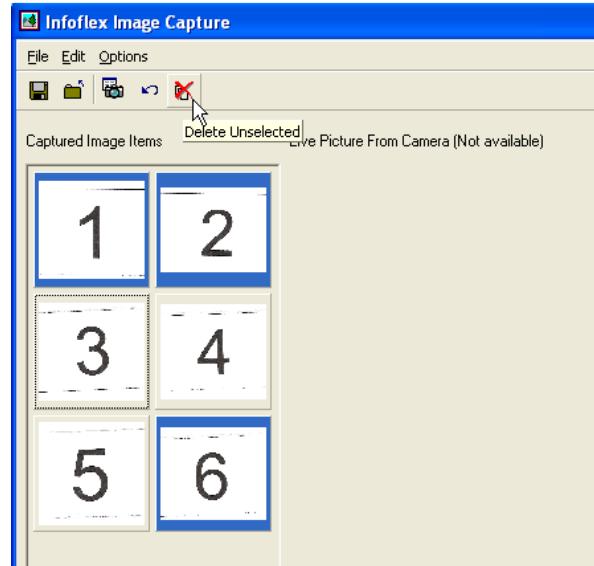
Note that you also need to press **Save** on the Data Entry screen in order to save the changes.

Deleting Images

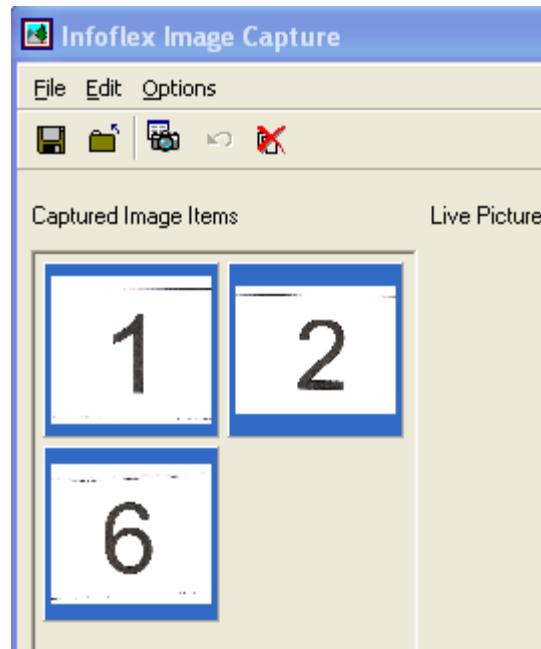
Images can be deleted from the Image Viewer application. The user can select the image and press the delete button or use the toolbar button marked:



If the **Capture Multiselect** property is set to **Yes** in Design Management, the **Delete Unselected** toolbar button is available in the InfoFlex Image Capture dialog. In addition, captured images can be multi-selected by single clicking each image. When the user presses the **Delete Unselected** toolbar button, any captured images that are not selected are deleted.



Once some images have been deleted, the remaining images are still selected. Images can be deselected by a single click and the **Delete Unselected** button can be used again as necessary.



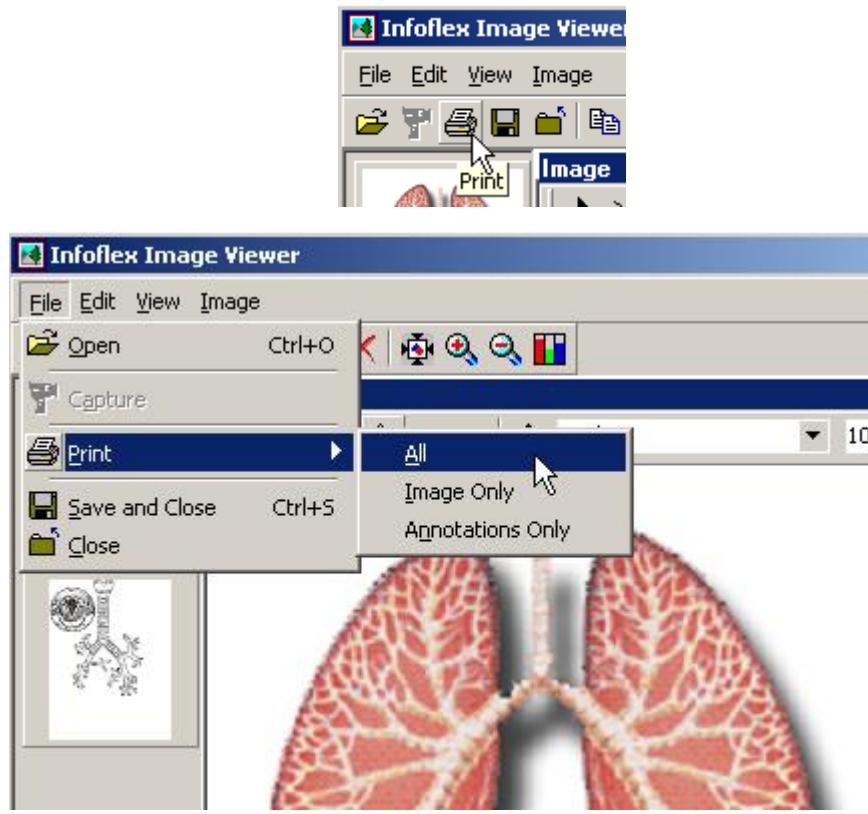
Once images have been deleted using the **Delete Unselected** toolbar button, the **Remove Last Image** button is disabled. It is possible to capture further images, and the **Remove Last Image** button is re-enabled if further images are captured.

The **Capture**, **Remove Last Image**, **Save** and **Close** and **Close** buttons are unchanged.

If the **Capture Multiselect** property is not set in Design Management, the behaviour of the image capture dialog is unchanged. The **Delete Unselected** toolbar button is disabled and captured images cannot be multiselected.

Printing images

The InfoFlex image viewer includes a Print option to allow the printing of images. This can be found as a toolbar button and as a menu item on the **File** menu.

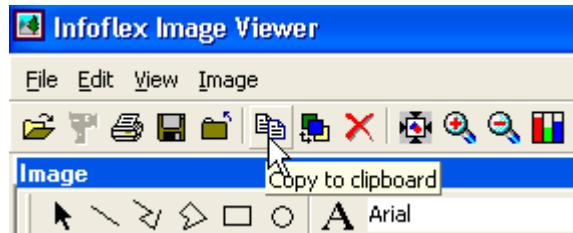


The user has the option to print both the image and annotations (**All**), or just the image or just the annotations.

Copying images

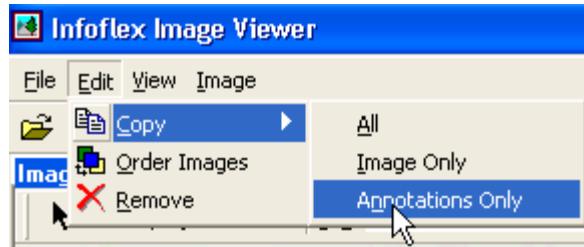
In the **Image Viewer** window, the selected image can be copied to the clipboard by pressing the toolbar button:

The keyboard **Ctrl+C** can also be used.



Further functionality is provided under the **Edit** Menu.

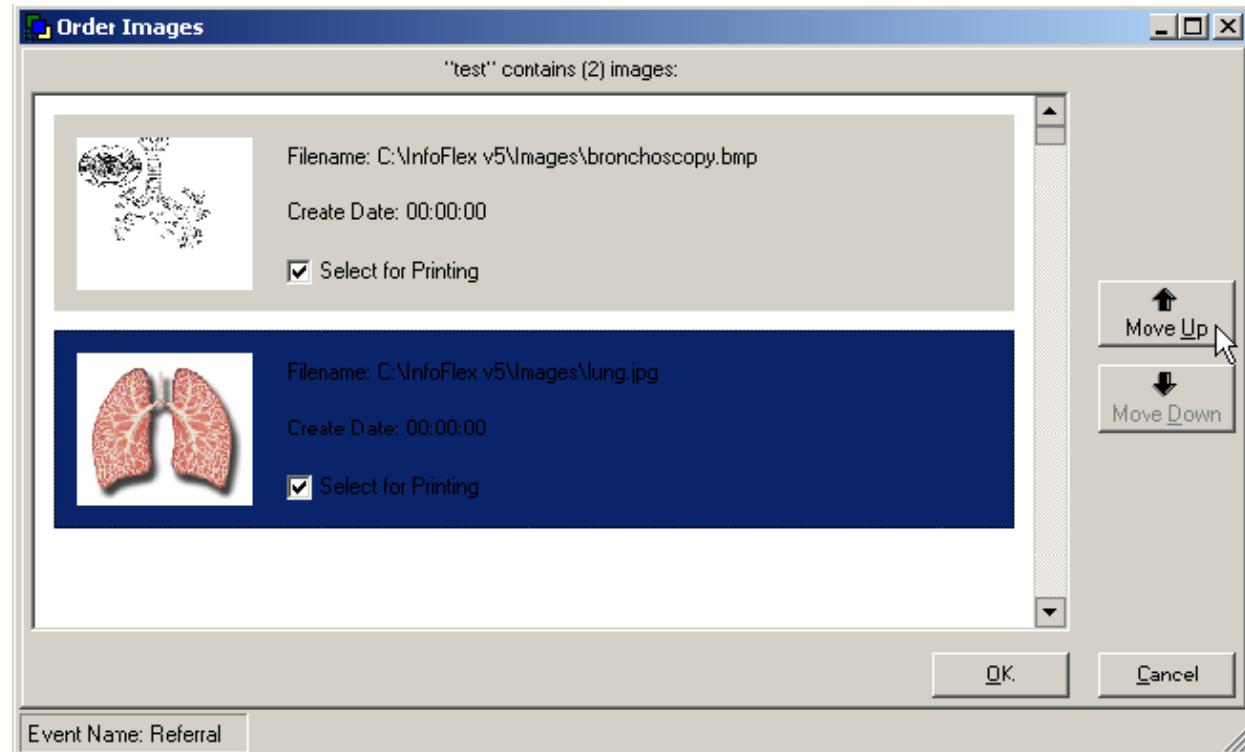
The user can copy both the selected image and its annotations (**All**), or just the image, or just the annotations.



Order Images dialog

The **Order Images** dialog allows images to be re-ordered and to be flagged as suitable for printing.

Press the  button to display the **Order Images** dialog.



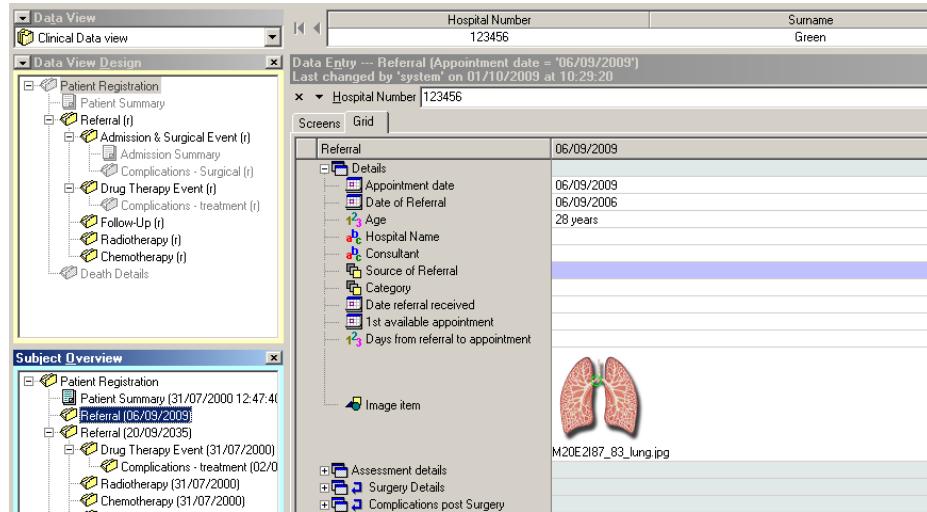
Use the **Move Up** and **Move Down** buttons to reorder the images.

Tick the **Select for Printing** check box against any images you wish to appear in documents.

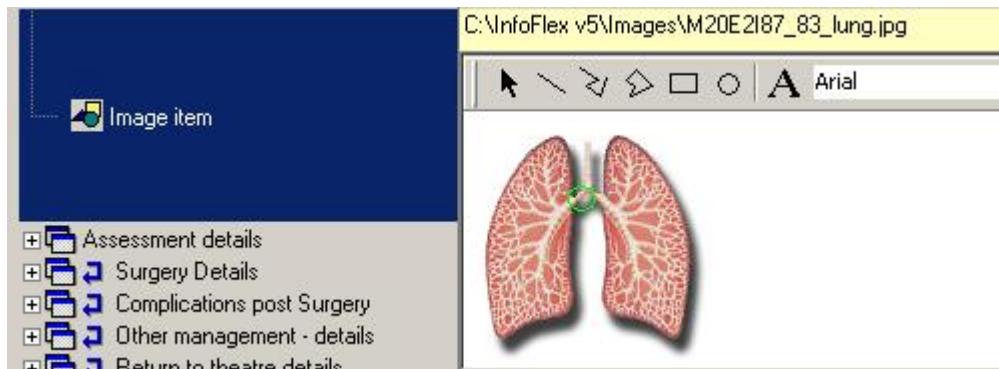
Press the **OK** button, to save the changes.

Data Entry Grid

The Data Entry Grid displays the currently selected image in the grid cell along with the selected image file name. The selected image is resized to fit the height of the grid cell, although the aspect ratio of the image is maintained.

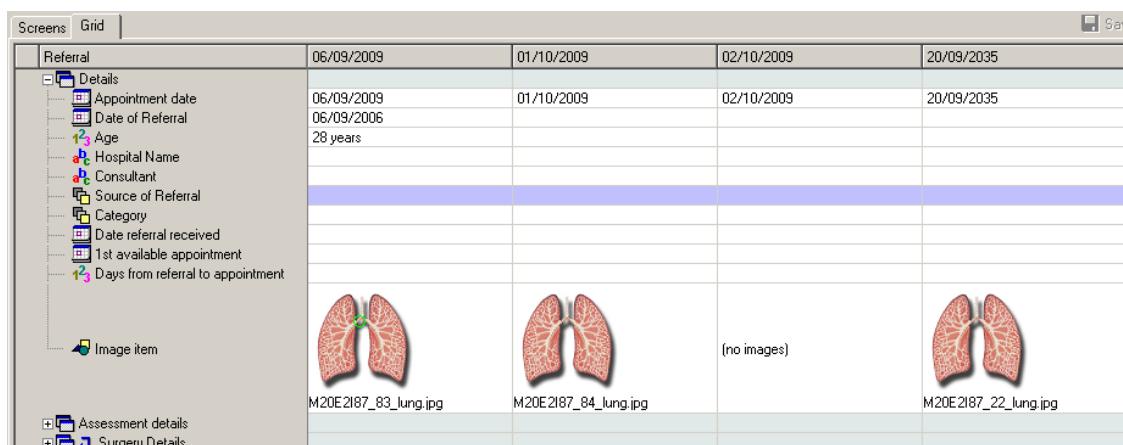


If you select the image item, you can increase the size of the image by pressing **F4**.



Viewing Multiple Images in the grid

Images from the same data item across different repeat events (within one subject) can be viewed simultaneously in the Data Grid. Select an event that contains an image item then choose the **Select Similar Events** menu item from the Event menu. This will place the images next to each other.

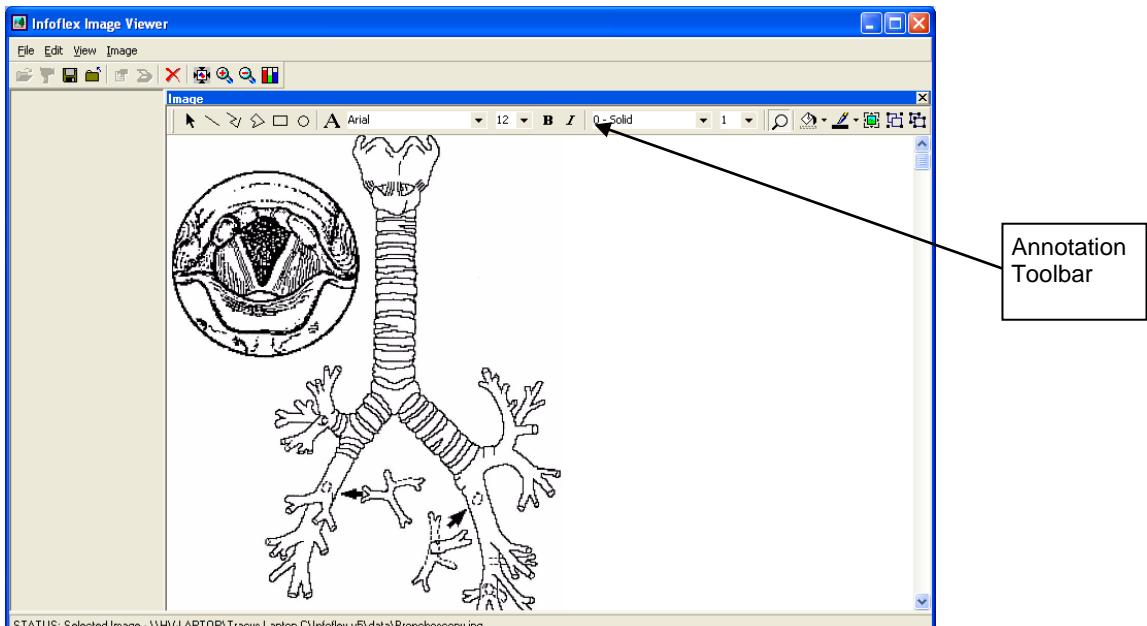


Using Image Annotations

To annotate an image, launch the **Image Viewer** application by clicking on the button indicated.



The image is displayed in the Image viewer. Use the annotation toolbar to add text, lines and shapes to mark relevant parts of the image. When adding text, drag the cursor to the size that you wish the text to be.



When finished press **F5** to save the annotation or select **Save and Close** from the **File** menu.

The panel item now displays the image with the annotations added.

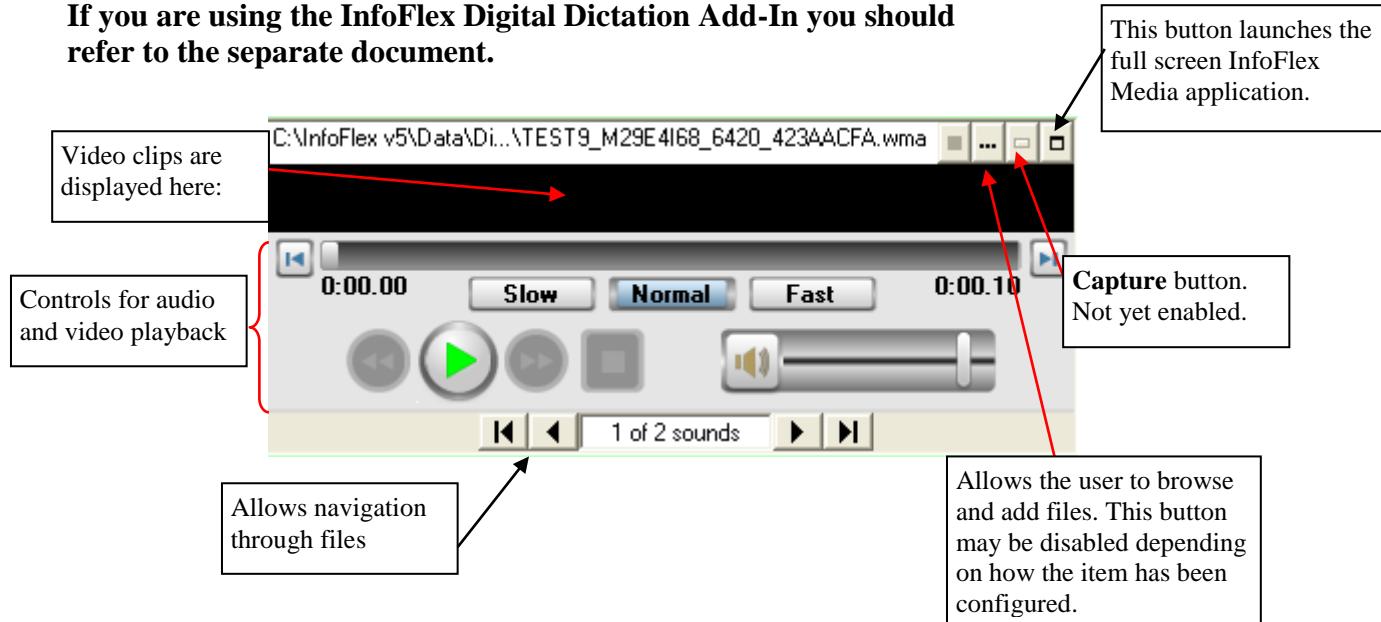


Note that the panel item has turned red because you have made a change to it. Save the change to the database by select the **Save** button on the Data Entry screen, or pressing **F5** or saving from the toolbar.

11.2 Audio and Video items

Media items that have been configured to store audio or video files have the same controls in Data Entry.

If you are using the InfoFlex Digital Dictation Add-In you should refer to the separate document.



When browsing for audio files, files with extensions **.wav**, **.wma**, **.mp3**, **mpa** and **.mid** are searched for. When browsing for video files, files with extension **.avi**, **.wmv**, **.mpg**, **.mpeg**, **.divx**, **.m1v** and **.mp2** are searched for. More than one file can be saved if the **Multiple Select?** property has been set.

Once the event is saved, the files are stored in the specified folder. The files can be played from Data Entry or the full screen InfoFlex Media application can be opened (see below).

Any change to the media item, including selecting which file is currently visible, will cause the **Save** button for the event to be enabled indicating that a save is required.

Attaching audio or video files

Press the Browse button  to navigate and select a file to attach. More than one file can be saved in a media item if the **Multiple Select?** property has been set.

Default clip

It is possible that a default clip has been defined. In this case the same clip will be displayed in the media item for all patients. The **Browse** button may be disabled to prevent further files being added.

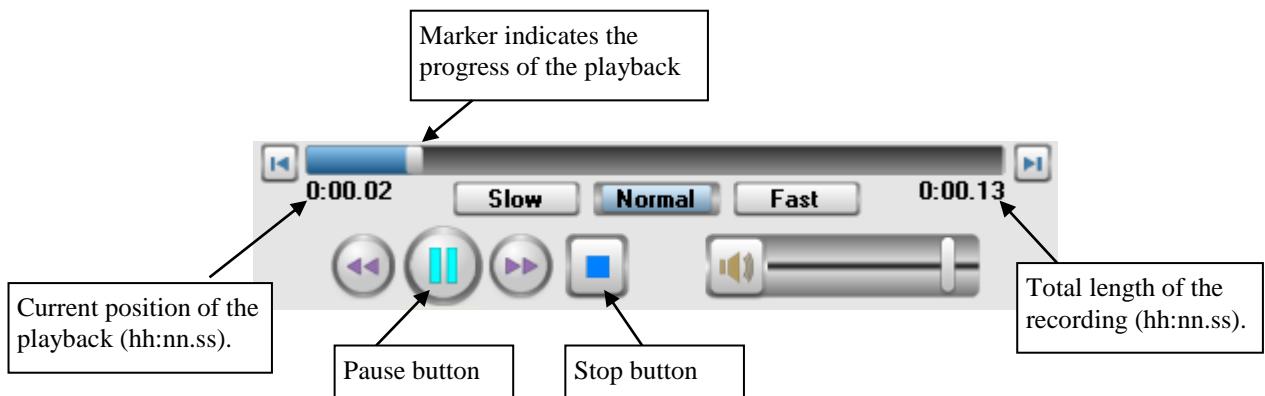
Playing Audio and Media files

To play back the audio or video, press the **Play** button.



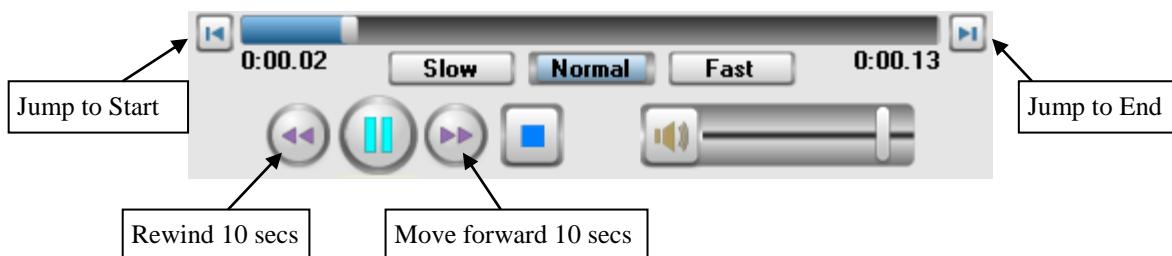
Once the audio or video is playing, the other controls are enabled.

During playback, the **Play** button turns to a **Pause** button. The marker moves along the slider and the counter continually shows the current position of the playback. You can move the playback marker along the slider to adjust the playback position. You can move the slider before or during playback, and while the playback is paused.



To pause the playback, press the **Pause** button. The playback marker stays at its position on the slider. To restart the playback, press the **Play** button again. To stop the playback and move the marker back to the beginning, press the **Stop** button.

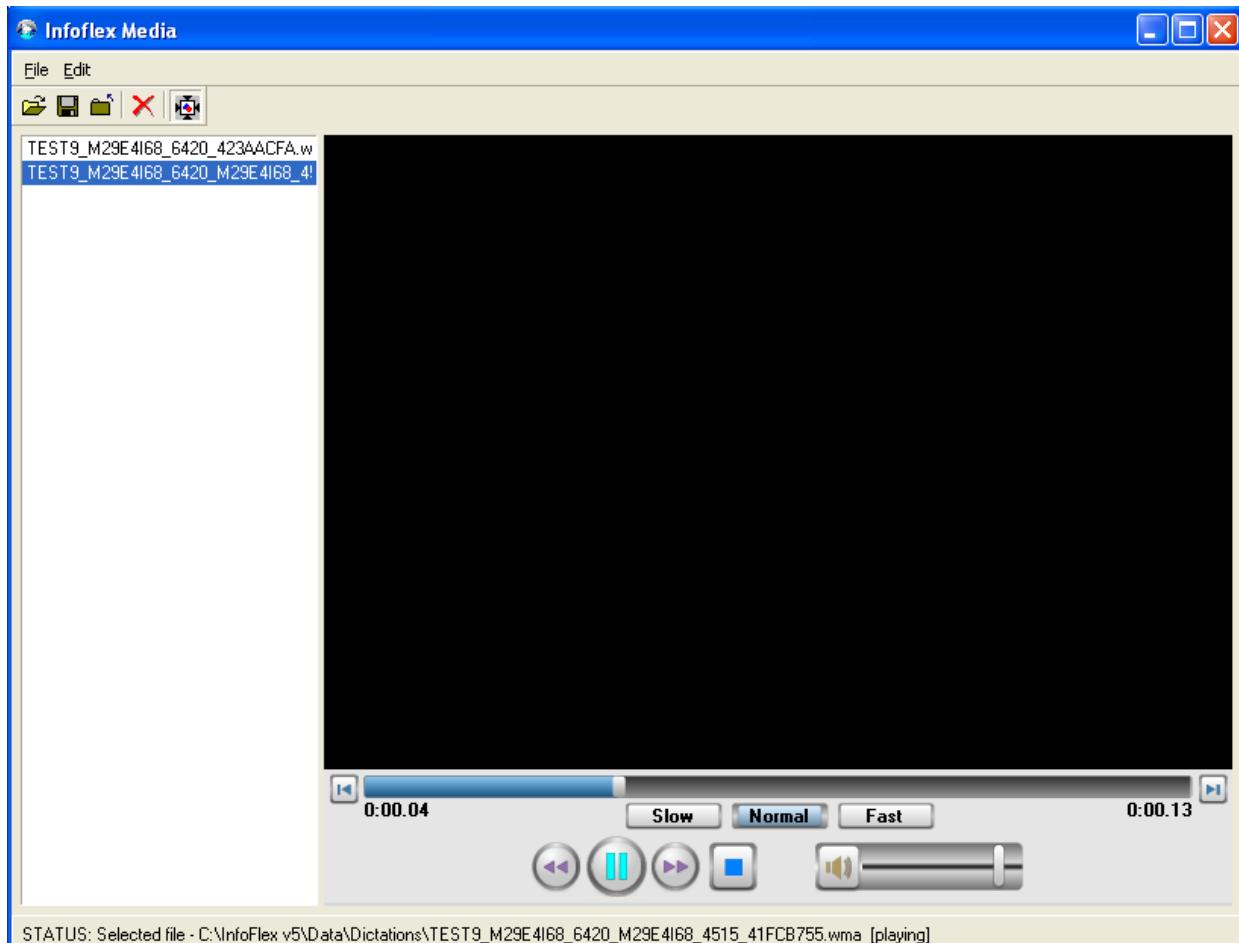
The **Rewind** and **Fast Forward** buttons move the playback back or forward by 10 seconds. The **Jump to Start** and **Jump to End** buttons move the playback marker to the start or end of the recording. If playback is in progress when you press the Jump to Start button, playback will start again from the beginning of the recording.



The **Slow** button slows down the playback and the **Fast** button speeds up the playback. The **Normal** button resets the playback speed to Normal.

InfoFlex Media application

Press the  button to open the InfoFlex Media application. This application allows audio and video files to be played and shows video files in full size. The playback controls are the same as described above. The application also allows files to be added and deleted.



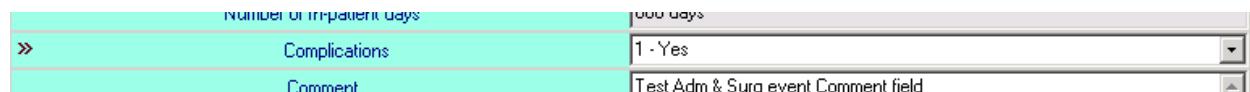
Changes made in the InfoFlex Media application should be saved before closing the window.

Note that you also need to press **Save** on the Data Entry screen in order to save the changes.

12 Branching items

A branching item is any item which, when certain criteria are fulfilled will immediately call up an item or screen of items to be completed. This mechanism is used either to save the data entry user having to skip past items which are not relevant, or to force the user to enter data in items which are immediately relevant.

An item which branches in this way is indicated by a chevron symbol  to the left of the item name.



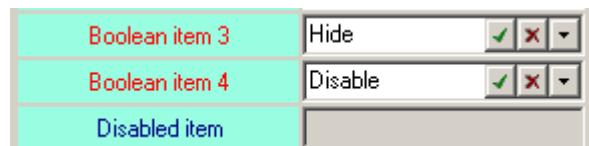
When you press return after entering data in a branching item, if the criteria have been fulfilled you will automatically be taken straight to the branching items, and on completion, will return to where you were in data entry.

Note that you must press return out of the branching item in order to call up the branching screen. Using the mouse to move to the next item will not cause the branching screen to be displayed.

13 Item availability

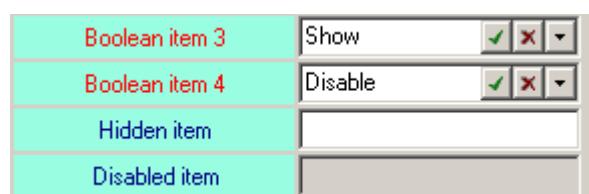
In Data Entry it is possible for some items to become available only when certain conditions are met. An item can be either hidden or disabled until the condition has been met.

In this example, **Boolean item 3** controls whether the **Hidden Item** is displayed, and **Boolean item 4** controls whether the **Disabled item** is enabled or disabled.



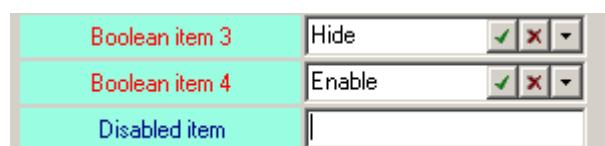
Boolean item 3	Hide	  
Boolean item 4	Disable	  
Disabled item		

When **Boolean item 3** is set to **Show**, the **Hidden item** is displayed and data can be entered.



Boolean item 3	Show	  
Boolean item 4	Disable	  
Hidden item		
Disabled item		

When **Boolean item 4** is set to **Enable**, the **Disabled item** is enabled for data entry.



Boolean item 3	Hide	  
Boolean item 4	Enable	  
Disabled item		

14 Derived items

Derived items are indicated by a grey background in data entry. Derived items contain values which are automatically calculated or text which is looked up based on earlier entries. This means you cannot enter data in the item yourself.

Derived items might be

- dictionary linked items, where the code you enter retrieves a meaning which is displayed in the dictionary item, and also retrieves data which populates one or more linked items.

GP Code	X9870006 - Smith
GP Telephone number	01234 567891
GP Initial	F
GP Title	DR
GP Address1	THE GROUP PRACTICE
GP Address2	6 The Street

- calculations made with mathematical formulae using dates or values entered in other items

Date referral received	27/07/2000
1st available appointment	31/07/2000
Days from referral to appointment	004 days

- derived dictionary items, where the derived item is looked up from a dictionary based on data entered in various contributory items.

Pathological T Stage	pT1b - 0.5cm
Pathological N Stage	pN0 - No regional lymph node metastasis
Pathological M Stage	pM0 - No distant metastasis
Overall stage	Stage I

15 Marking data Missing or Unknown

If data for a particular item is not applicable or unknown, F11 can be used instead of leaving it empty. The field will be marked with a green background, and in data analysis will be shown by the code **-88888**.

Main Surgical Procedure	F34.3 - DILATATIONAL LASER TUNISILLIUM
Other Surgical Procedure	
Date of Discharge from Hospital	31/07/2000

Similarly, if you want an item to be marked as missing rather than unknown or leaving it empty, press F12. The field will be marked with a purple background, and in data analysis will be shown by the code **-99999**.

Operation date	31/07/2000
Surgeon	
Main Surgical Procedure	F34.3 - RII ATFRAL LASFR TONSII FECTOMY

These keys are useful in data analysis and data housekeeping.

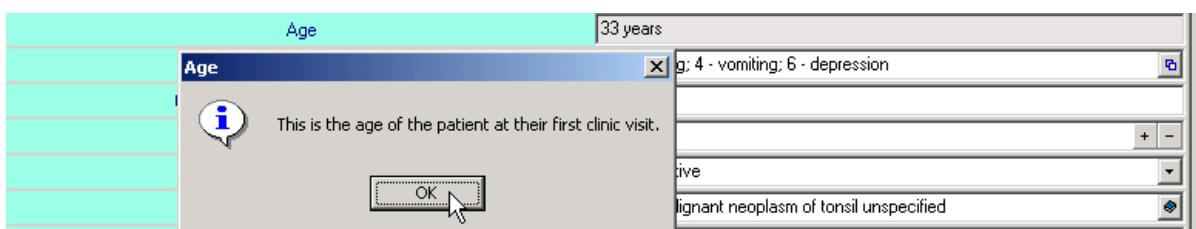
16 Help, auto-prompt and tooltips

In some items, help text will automatically appear when you put the cursor in the item. This is known as **autoprompt**.



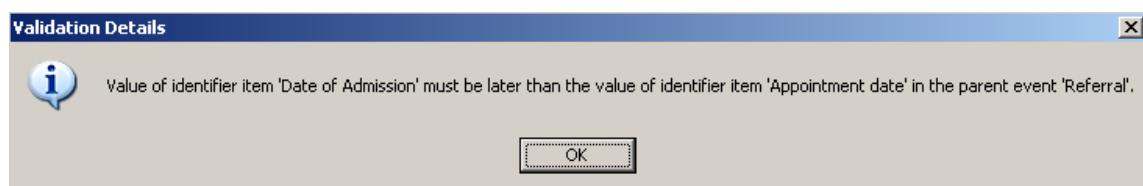
In the CIMS training database, you can see auto-prompt text in the **Initial Diagnosis** item in the **Referral** event.

There may be help text available even if auto-prompt text doesn't appear automatically. To see if help text is available, press F1.

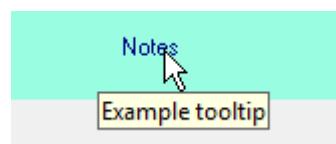


In the CIMS training database, you can see help text in the **Age** item in the **Referral** event.

Shift + F1 can be used to look up the rules that have been set for warning and mandatory limits on date and value items, and event and item restrictions.



Some items have tooltips defined which are displayed when hovering over the item name.



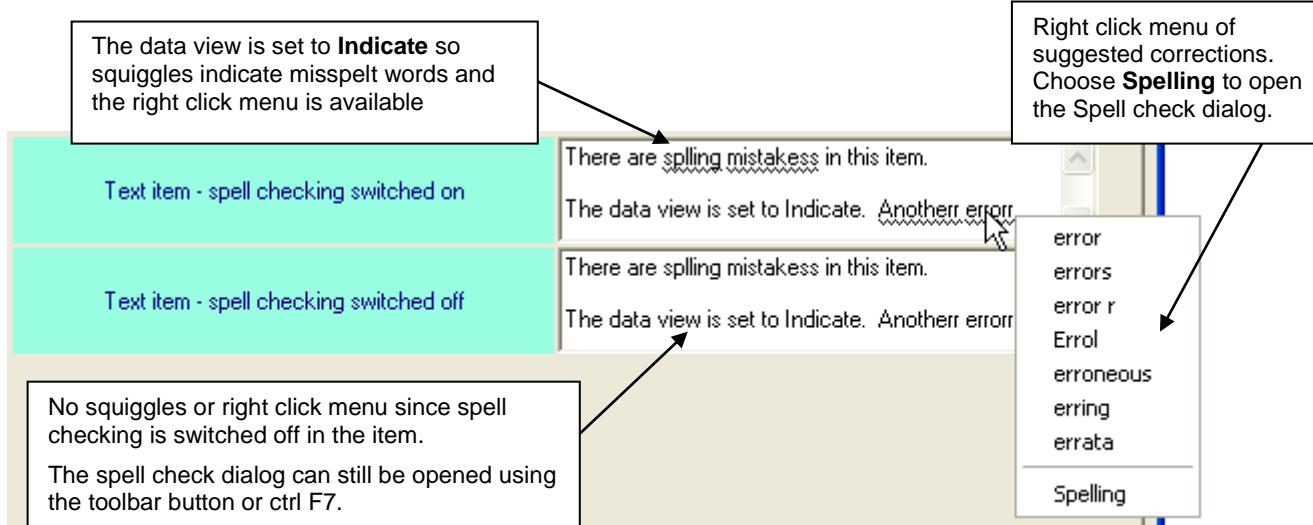
17 Spell checking

Text in text or memo fields can be checked at any time by selecting the item then pressing the toolbar button or ctrl F7. These actions display the spell check dialog, regardless of whether there is any configuration in Design Management.

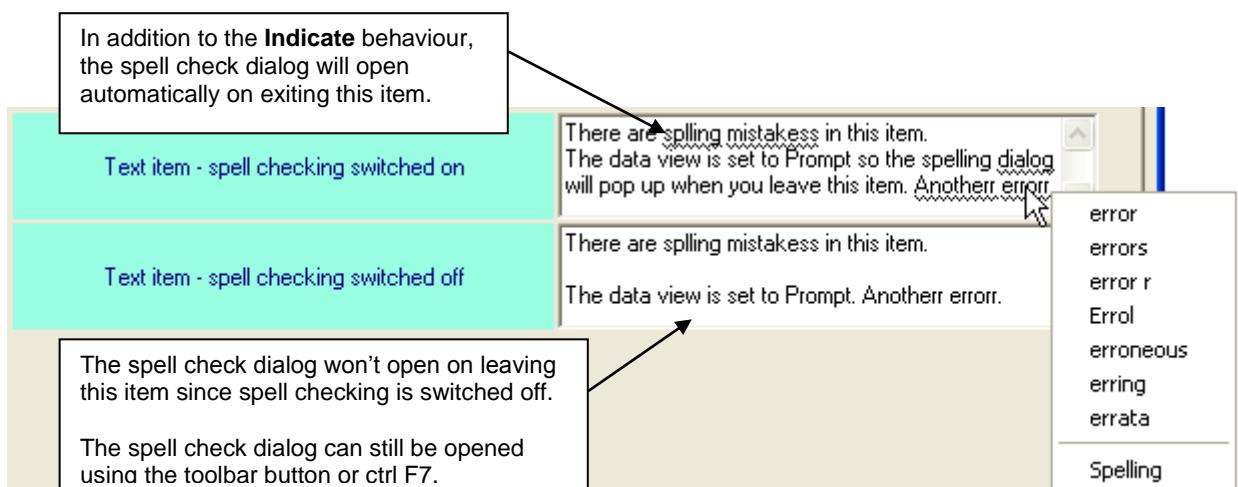


Individual text and memo items can have additional functionality switched on. When individual items have spell checking switched on, a data view setting controls which automatic behaviour occurs.

If the data view **Spell Check Behaviour** option is set to **Indicate**, all misspelt words (in items where spelling is switched on) have squiggles underneath and the right click menu showing suggested corrections is available.



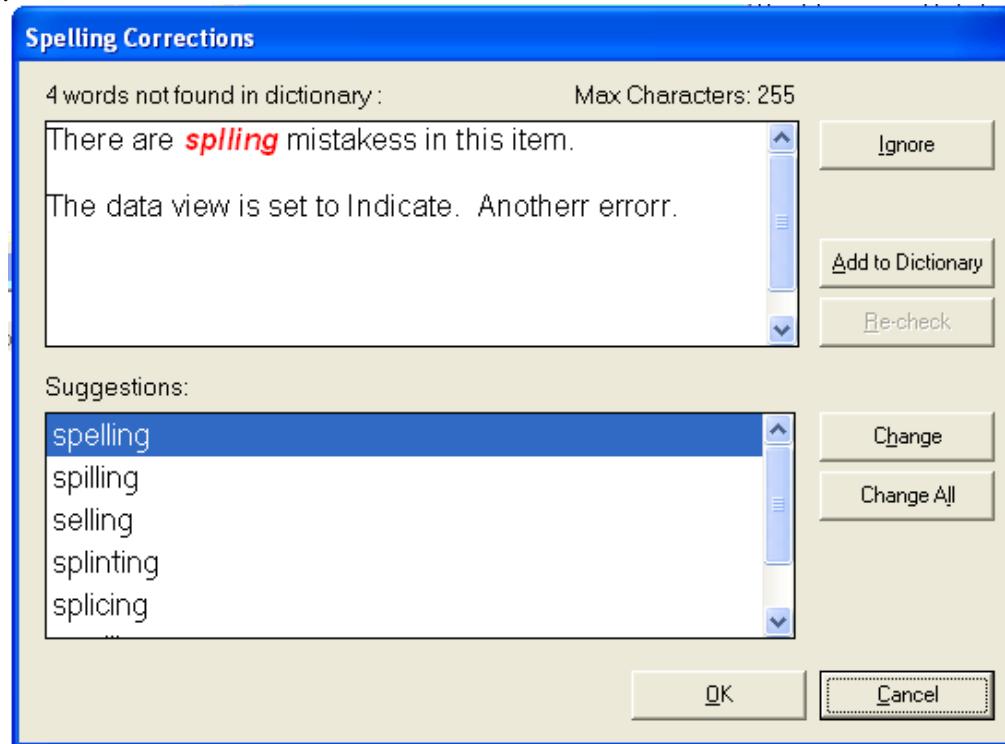
If the data view **Spell Check Behaviour** option is set to **Prompt**, the behaviour described above for **Indicate** happens and in addition the spell check dialog opens automatically on exiting the item if there are misspelt words (in items where spelling is switched on).



If the data view **Spell Check Behaviour** option is set to **None**, no squiggles are shown and the right click menu is not available, even if individual items have spell checking switched on. However the spell check dialog can still be opened from text and memo items by pressing the new toolbar button or ctrl F7.

The spell check dialog

Whenever the spell check dialog is displayed, a count of the misspelt words is shown and the first misspelt word is highlighted in red. Once the first word is dealt with, the next misspelt word is highlighted.



There are several ways of dealing with misspelt words.

Ignore

the word is left as it is. It remains in the count of misspelt words and it is still identified by squiggles, but it is not changed.

Add to Dictionary

the word is added to the InfoFlex custom dictionary, and subsequently to the Word custom dictionary. It is no longer included in the count of misspelt words and any further occurrences of the word are not identified as misspelt.

Change

changes the word to whichever word is selected in the **Suggestions** box.

Change All

changes all instances of that word in the current spell check dialog to whichever word is selected in the **Suggestions** box.

Editing the text in the spell check dialog

It is possible to type in the spell check dialog to correct spellings or to edit and add to the existing text. When you have finished editing, press the **Re-check** button in order to resume the spell check. All the edited text and any remaining text will be checked.

Notes:

- 1 Changes made in the dialog are not reflected in the InfoFlex item until the user closes the dialog using **OK**.
- 2 The spell check dialog will only display if there are misspelt words. If the user tries to open the dialog and there are no misspelt words, the following message is displayed:
- 3 Changes made in the dialog apply to the text in the current item. If the same misspelt words occur in other InfoFlex items, they will need to be checked separately.
- 4 Text items have a limit of 255 characters. This limit is maintained in the spell check dialog. If text is changed manually in the dialog, only 255 characters are allowed. If a word is changed using the **Change** button and its number of characters increase such that the total characters in the item would be more than 255, the last word in the item is cropped until the total number of characters is 255. If the last word therefore becomes misspelt it will be identified by the spell check, but otherwise no warning is made that text is being cropped.



Closing the spell check dialog

Although words are corrected in the spell check dialog, the text in the InfoFlex item is not updated until the user presses the **OK** button to close the dialog. If the user presses **Cancel** to close the dialog, the text in the InfoFlex item is not updated even though changes may have been made in the dialog itself.

It is possible to close the dialog before all the misspelt words have been dealt with. If the user presses **OK**, all changes made so far will be updated into the InfoFlex item. If the user re-opens the spell check dialog, the remaining misspelt words will be handled.

Handling Punctuation and Numbers

In line with the behaviour in Word, words starting or ending with the following characters will not be flagged as misspelled: ! “ £ \$ % ^ & * () - _ + = [] { } # ~ ; : @ ‘ < > ? , . /

Misspelled words starting or ending with punctuation will be squiggled or highlighted, but the squiggle or highlight will not extend to the punctuation symbol.

Words containing these characters will be flagged as misspelt.

Words containing any numbers eg 7seven, se7en will not be flagged as misspelt.

APPENDIX B - SAVING

The Save button  becomes highlighted in red as soon as a new event is generated or any changes are made to any existing data. This indicates that there is unsaved data on the screen.

Any items which have had data entered or changed will also have their item names displayed in red. The item name remains red even if you change the data back to its original value.



To save data at any time, press **F5**, or the **Save** button.

After saving, the save button is disabled . This indicates that all the data on the screen is saved.

When you reach the end of an event you are entering data in, on pressing return after entering data in the last item, you will be asked if you want to save the data. (See above section on **Warnings and Restrictions**).

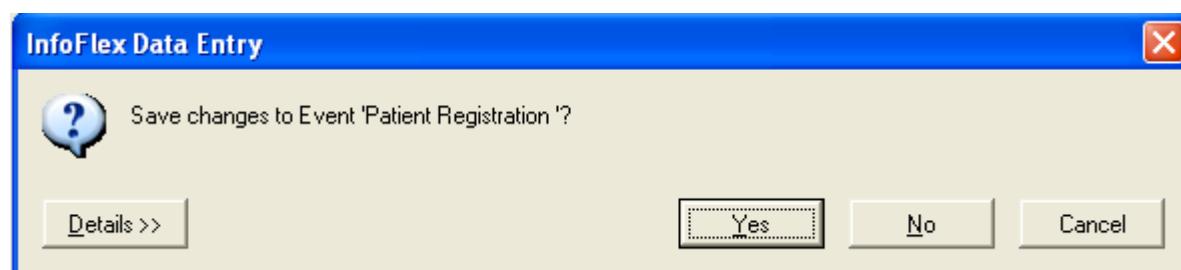
Warnings and Restrictions

If any of the data you have entered does not meet any mandatory restrictions which have been set up, you will not be allowed to save the event, and you will be asked to re-enter the data. If this is the case prompt messages will be displayed.

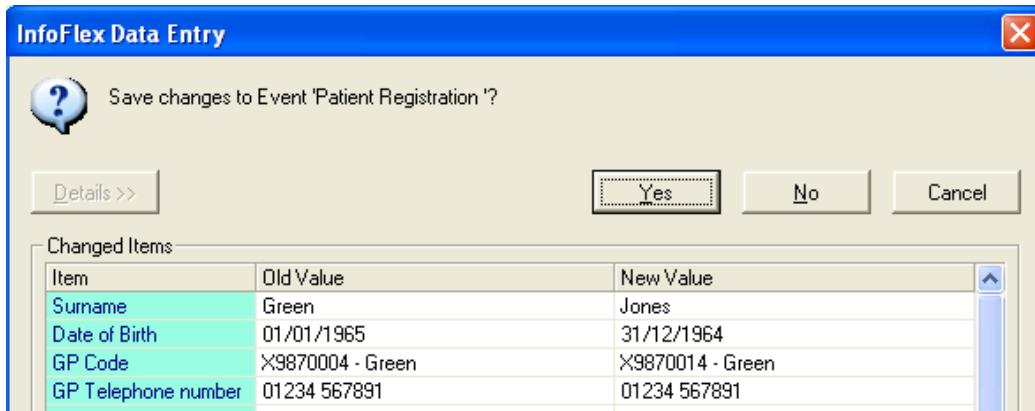
Safeguards

If you have entered some data that you subsequently don't wish to keep, select another event or patient without saving, and choose no when you are asked if you wish to save.

If you try to leave the event or the patient without having saved some data that you have changed, you will be asked if you wish to save the data before continuing.



The **Details** button allows you to view which items have changed. Note this list includes all items that have been changed, even if they have then been changed back to their original value.

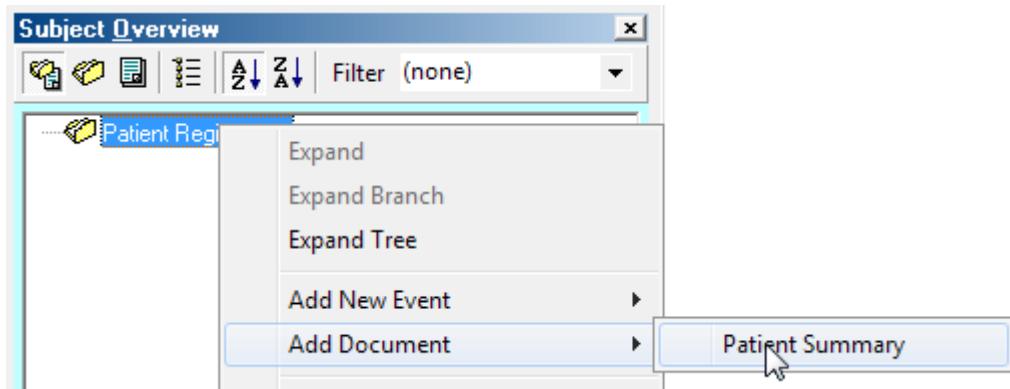


The list also includes any dictionary linked items that have been refreshed.

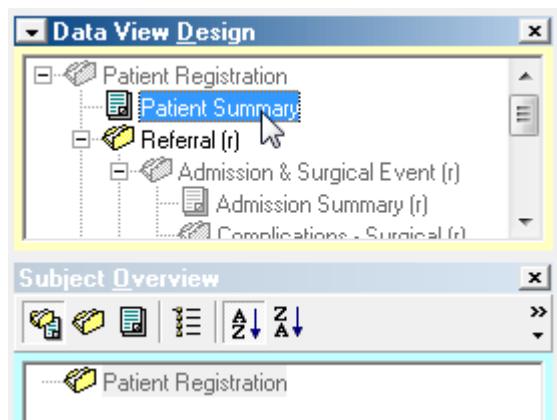
APPENDIX C – GENERATING DOCUMENTS

The following examples are the different methods of attaching a document to a subject overview. Note that for methods 2 – 5 below, the appropriate parent must first be selected in the subject overview.

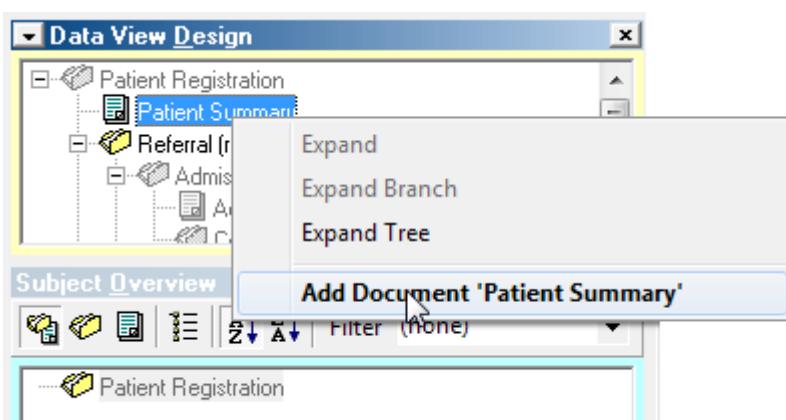
Adding document 1 – right click parent event in the subject overview



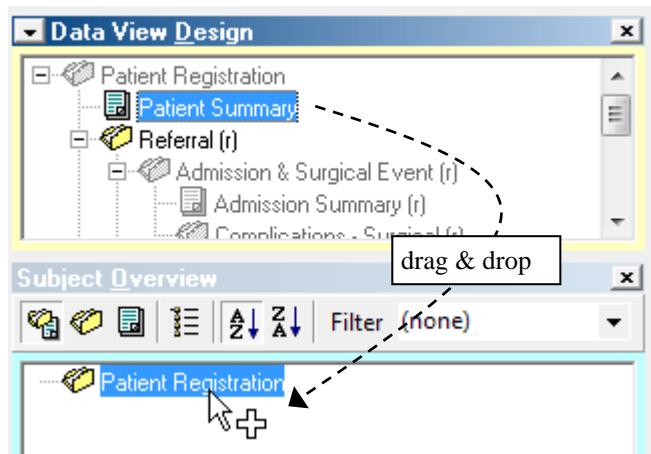
Adding document 2 – double click Data View design



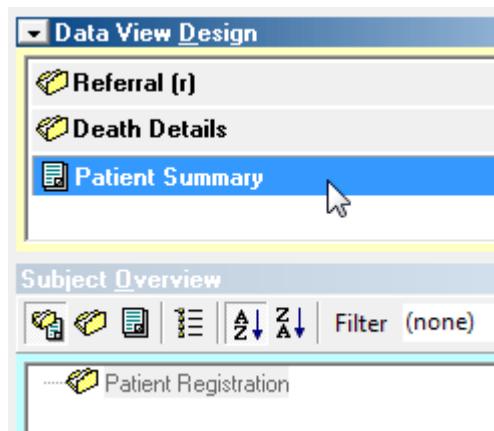
Adding document 3 – right click Data View design



Adding document 4 – drag and drop

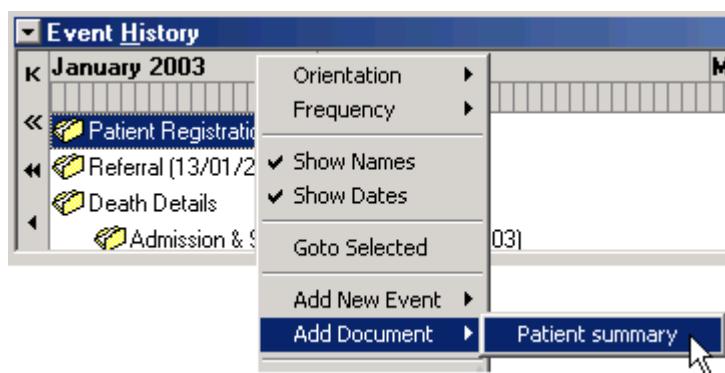


Adding document 5 – button view



Adding document 6 – right click parent event in timeline

Display the Event History (from the View menu choose **Event History**).



APPENDIX D – NAVIGATION IN DATA ENTRY

Shortcut	Action	From which item
Ctrl+Home	Move to first item on first screen	any
Ctrl+End	Move to last item on last screen	any
PgUp	Scroll up one page of items and select item	any
PgDn	Scroll down one page of item and select item	any
Ctrl+PgUp	Move to first item on previous screen	any
Ctrl+PgDn	Move to first item on next screen	any
Shift+PgUp	Move to first item in current screen, scrolling as necessary	any
Shift+PgDn	Move to last item in current screen, scrolling as necessary	any
Return	Move to next item or branch to item's target	any
Shift+Return	Move to previous item (could return from branch)	any
Tab	Move to next item (doesn't branch)	any
Shift+Tab	Move to previous item	any
Left/Right arrow keys	Moves the cursor left and right within the current edit box	any
Up/Down arrow keys	Changes selection in a coded item; decrements/increments date in a date item	any
F4	Calls up dictionary search	dictionary
F4	Calls up date picker	Date field or date / time
F4	Calls up code list	Coded or MR
F4	Displays the Image viewer	Image
Shift+F4	Calls up time picker	time or date / time
Ctrl+F4	Calls up dropdown list of screens	any
Ctrl+Q	Selects the entire contents of an item	any
Ctrl+Shift+Q	Positions the cursor at the end of the contents of an item	any

General navigation

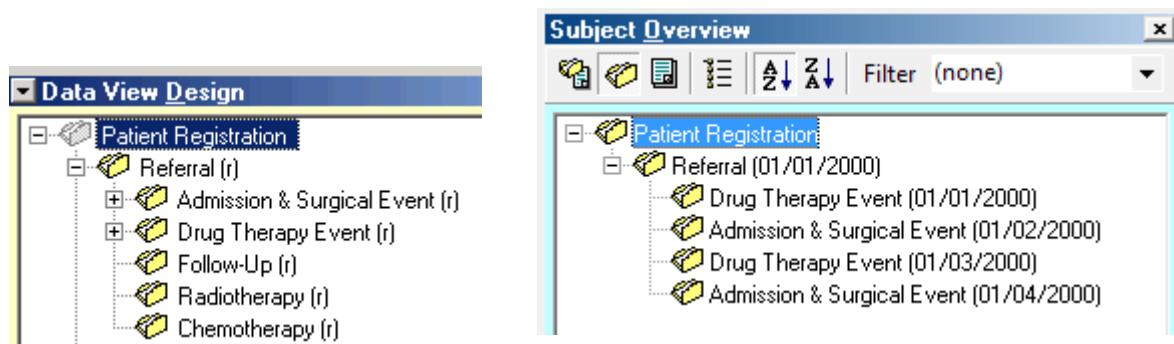
Shortcut	Action
F1	Calls up Help
F2	Calls up Subject list
F4	Item specific data entry functions (see above)
F5	Save
F6	Search for a subject
F7	Clears subject list
F9	Add new subject
F11	Mark an item as Unknown (green background)
F12	Mark an item as Missing (blue background)
Ctrl+D	Show documents
Ctrl+F	First subject
Ctrl+P	Previous subject
Ctrl+N	Next subject
Ctrl+L	Last subject
Ctrl+E	Add selected event in Data View design to selected parent in subject overview
Ctrl+S	Screen edit
Ctrl+G	Grid edit

A key strip is available to keep by the keyboard as a reminder of the functions assigned to the F1 – F12 keys. See Appendix H.

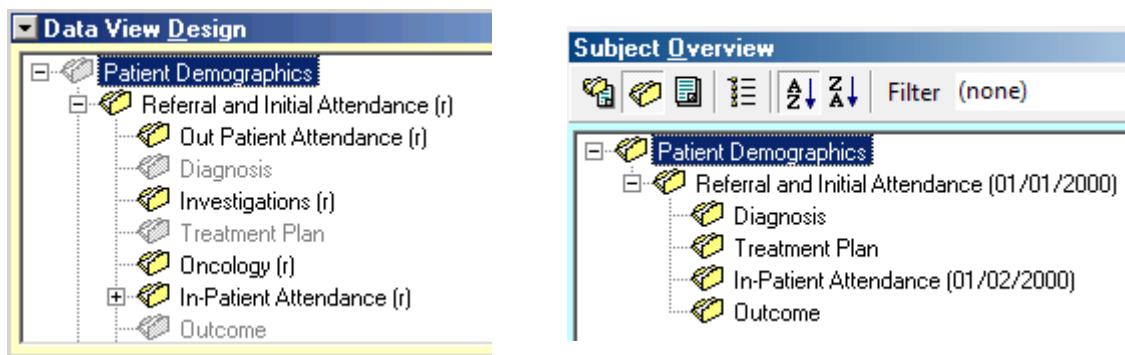
APPENDIX E – EVENT ORDERING IN THE SUBJECT OVERVIEW

The illustrations below assume that the value shown next to the event name in the subject overview is the event identifier and that the event identifier is configured to be the item the events are sorted by. In Design Management it is possible to define multiple item values to be shown next to the event name, and to configure which item the subject overview is ordered by. The item ordered by can be any of the items displayed or can be an item that is not displayed.

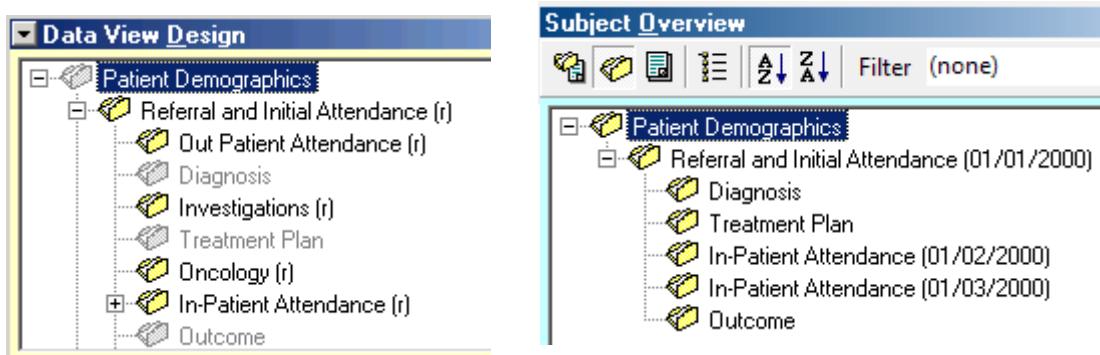
- 1 In the subject overview, if there are several repeat events at the same level but no non-repeat events, the events at that level are displayed in date order, not design order.



- 2 If the subject overview has several non-repeat events but only one repeat event at any level, the events are displayed in design order.

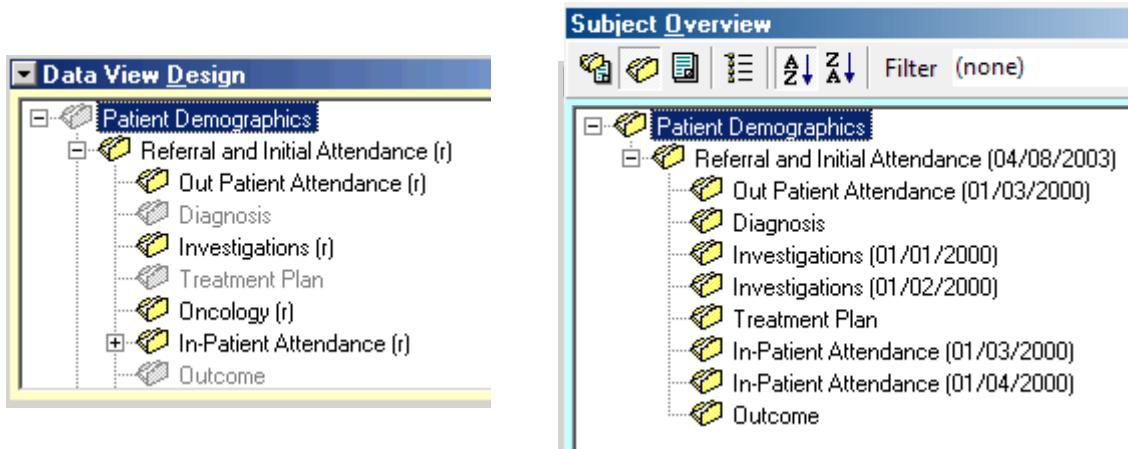


If there is more than one occurrence of the repeat event, the subject overview still displays in design order. Repeat events are displayed next to each other in date order.

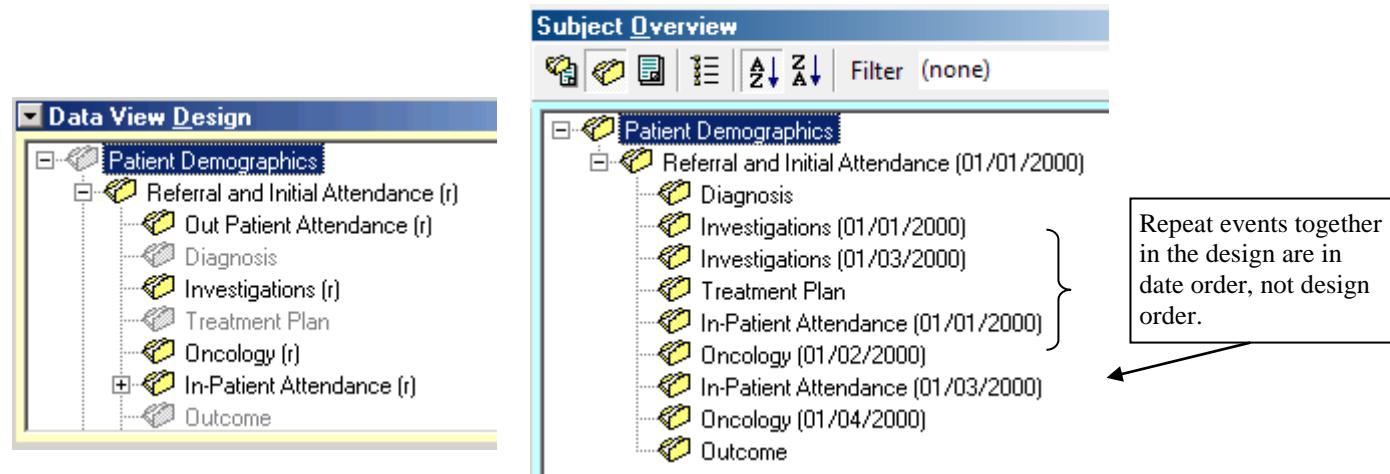


3 If the subject overview has several non-repeat events and more than one repeat event:

If the repeat events alternate with the non-repeat events, then the subject overview displays in strict design order, the repeat events being displayed together in date order.



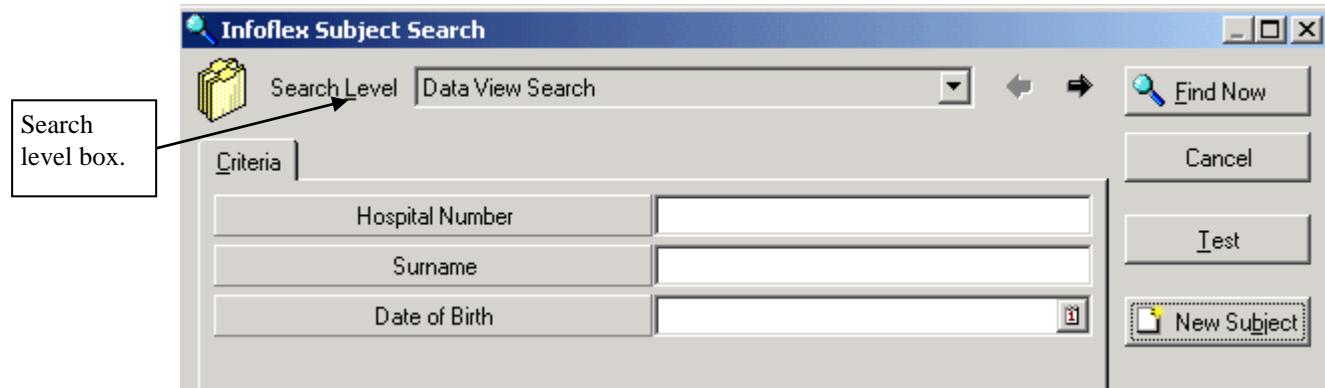
If any repeat events occur together in the data view design, then the subject overview displays them in date order. Otherwise events are displayed in design order.



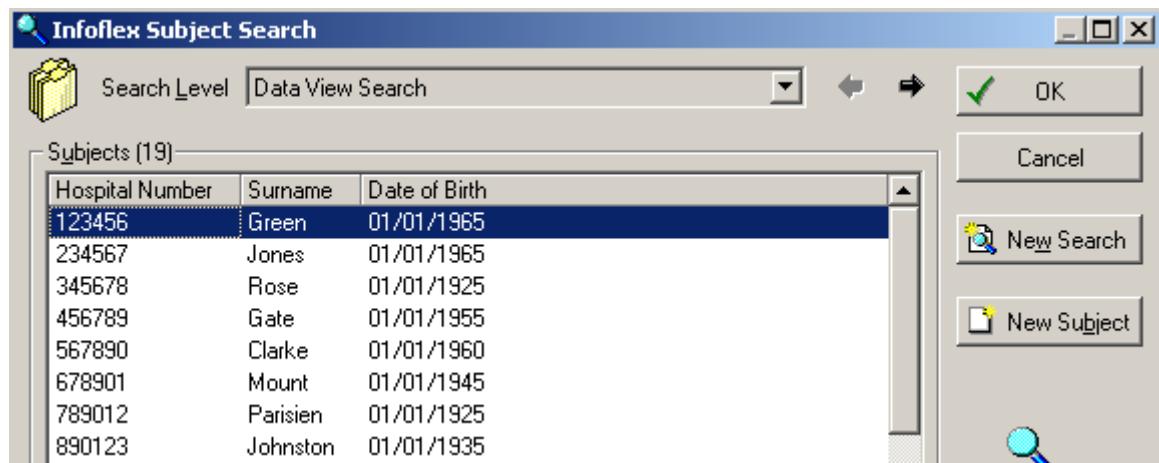
APPENDIX F – SEARCH LEVELS

Data view search

On the InfoFlex Subject Search window, the **Search Level** box defaults to **Data View Search**. This indicates that the search will look only for patients registered in studies that are represented in the data view.



If a data view level search finds patients in the data view that meet the criteria, these patients are displayed in the subjects list.

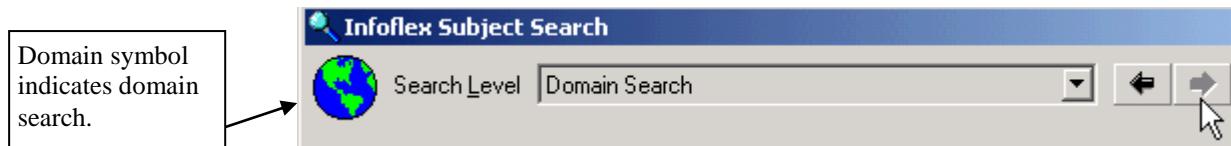


If a data view level search finds only one patient that meets the search criteria, the Subjects list is not displayed, but the patient's subject overview is displayed straight away on the main screen.

Domain search

You can change the Search Level by using the left and right arrows next to the Search Level box.

Pressing the right arrow will move the search level to Domain Search and the symbol next to the box changes to the domain symbol.

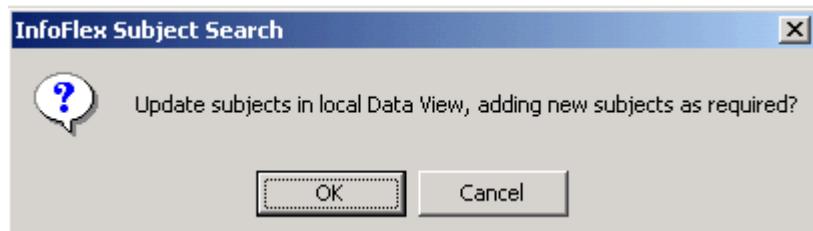


A domain level will search the entire domain, regardless of whether the patients are registered in any of the studies in the data view.

If the domain level search finds patients who meet the criteria, the patients are displayed in the Subjects list on the InfoFlex Subject Search window. The Subjects list is always displayed, even if only one patient is found that meets the criteria.

If you select one of these patients from the list, and this patient is already registered in a study represented in the data view, then the patient's subject overview is displayed.

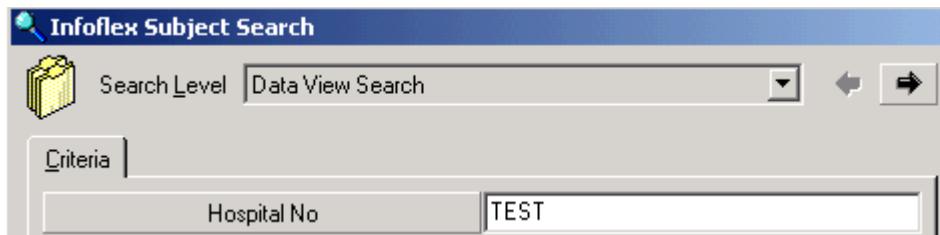
However, if you select a patient from the list that is not registered in any studies existing in the data view, you will be asked whether or not you wish to register the patient. The following message is displayed:



On saying OK to this message, the patient will be registered in all the studies in the data view, and the subject overview will be displayed.

Forced Domain search

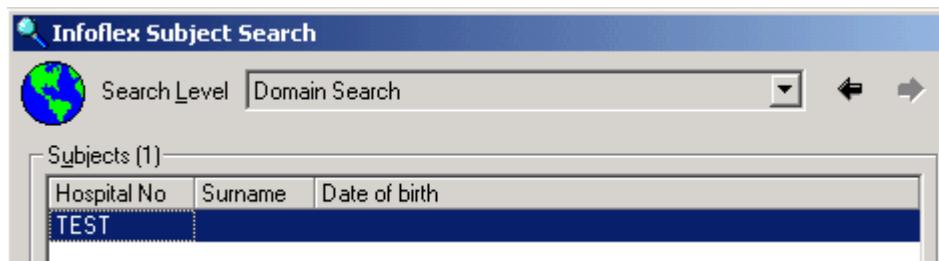
If a data view level search finds no patients in any studies represented in the data view that meet the search criteria,



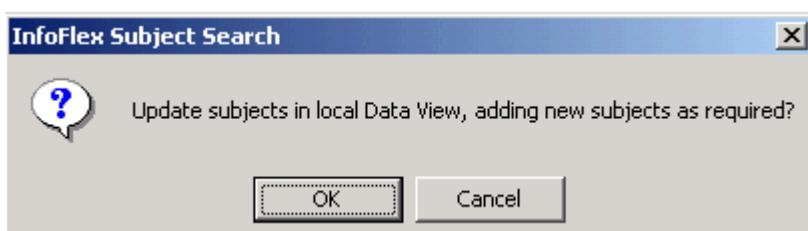
then InfoFlex automatically carries out a domain level search.

Any patients then found in the domain that meet the search criteria are displayed in the Subjects list.

If only one patient is found, then it is still displayed in the Subjects list. This is because the patient is not yet registered in any studies in the current data view, and you should check that this is the correct patient before continuing.

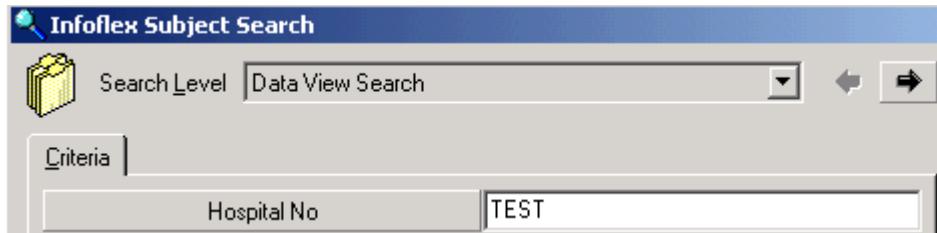


If you decide to select this patient for data entry a message will be displayed confirming that you wish to register the patient.



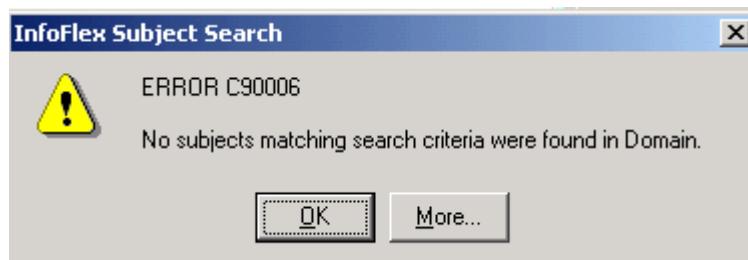
No patients found

If you carried out a data view level search and no patients were found in any studies represented in the data view



then InfoFlex would automatically carry out a domain level search.

If the domain level search found no patients, then the following message would be displayed:



APPENDIX G – LOCKING THE APPLICATION

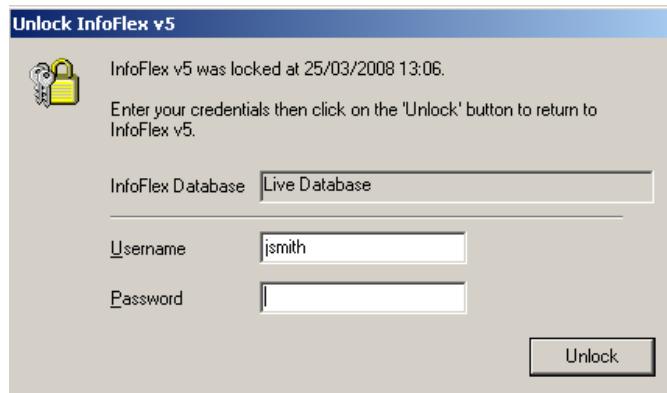
InfoFlex can be locked by using a new **Lock Application** button or **Ctrl F12**. The **Lock Application** button can be found on the toolbar between the **Change Database** and module buttons. Once locked, a password is required in order to unlock the application.



Unlocking Data Entry or Work List

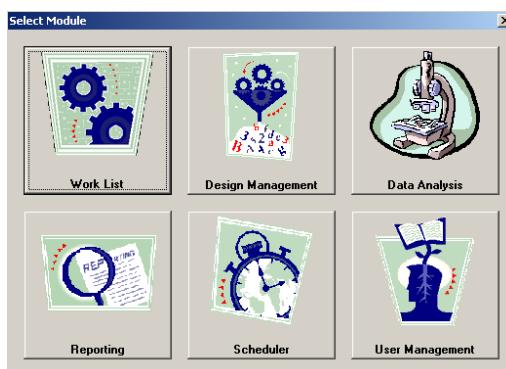
If the application is locked when the user is using Data Entry or the Work List module and there are no unsaved changes, then **any user** can now unlock the application. In this case, the user who unlocks the application will be logged in and the audit trail will attribute any changes made to this new user.

The following message is displayed when the application is locked:

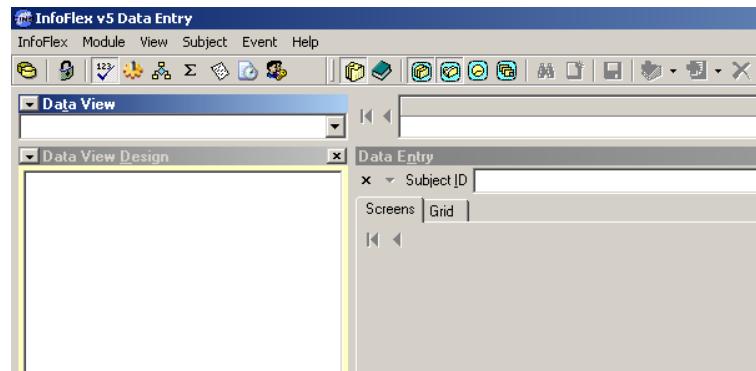


If a new user logs in and has the same permissions, the screen will be displayed exactly as the original user left it.

If the new user doesn't have access to the module that was locked, the new user will see the module select screen, or go straight into their module if they only have permission to one module.



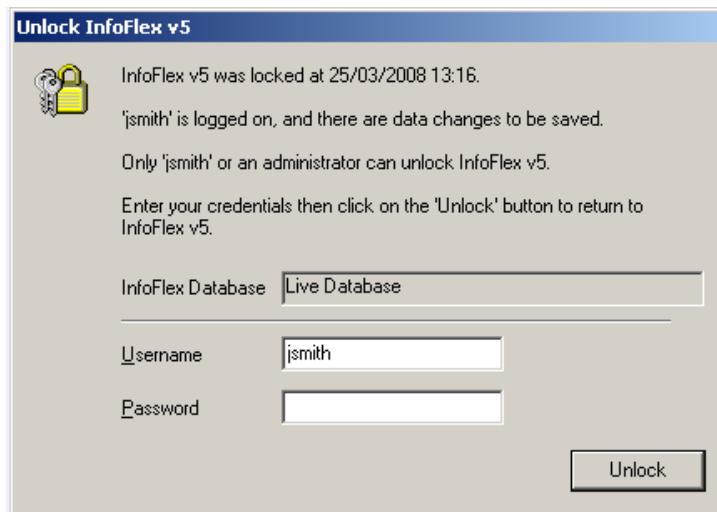
If the new user doesn't have access to the data view that was displayed, the Data View selection and all other boxes will be blank.



Unlocking Data Entry or Work List when there are unsaved changes

If the application is locked when the user is using Data Entry or the Work List module, and the user has made some changes which have not been saved, then the application can only be unlocked by the same user or a system manager. Note that in this case, the original user remains logged in (and their permissions applied) even if the application is unlocked by a different user. If the new user saves the changes, the audit trail will still attribute the changes to the original user.

The following message is displayed when the application is locked:



Unlocking other modules

If the application is locked when the user is using any module apart from Data Entry or Work List, then the application can only be unlocked by the same user or a system manager. Note that even if the application is unlocked by a different user, it is still the original user who is actually logged in and whose permissions are applied. Therefore if the user who unlocks the application makes any changes that would be logged by the audit trail, these changes will be attributed to the original user, not the user who has unlocked the application.

The following message is displayed when the application is locked:



APPENDIX H – INFOFLEX KEY STRIP

Please cut out this key strip and keep it on your keyboard to remind you of the Data Entry short cuts.

InfoFlex v5 Data Entry								
F1	F2	F4	F5	F6	F7	F9	F11	F12
Display Help text	List Subjects	Open date, code & dictionary selection	Save Data	Find Subject	Clear Subjects	New Subject	Data NA/ Not Known	Missing Data